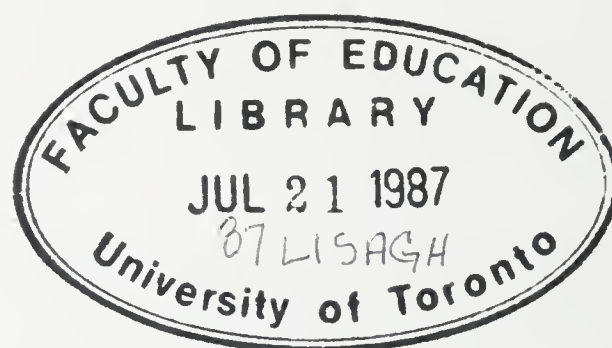


BUSINESS STUDIES

Intermediate and
Senior Divisions
1987

Marketing

OHEC
373.1909713
059DE/C-C9-1



Course Codes

The marketing section of the business studies guideline comprises two programs: marketing and stockkeeping and warehousing. The two programs include the following courses:

- Merchandising, Basic Level (BMM1B)
- Merchandising, Basic Level (BMM2B)
- Merchandising, Basic Level (BMM3B)
- Merchandising, Basic Level (BMM4B)
- Retailing, General Level (BMR)
- Marketing, General Level (BMK)
- Marketing, Advanced Level (BMK)
- Stockkeeping and Warehousing, Basic Level (BMS1B)
- Stockkeeping and Warehousing, Basic Level (BMS2B)
- Stockkeeping and Warehousing, Basic Level (BMS3B)
- Stockkeeping and Warehousing, Basic Level (BMS4B)

BUSINESS STUDIES

Marketing

1. Marketing, Intermediate and Senior Divisions
2. Stockkeeping and Warehousing, Intermediate and Senior Divisions

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1. Marketing

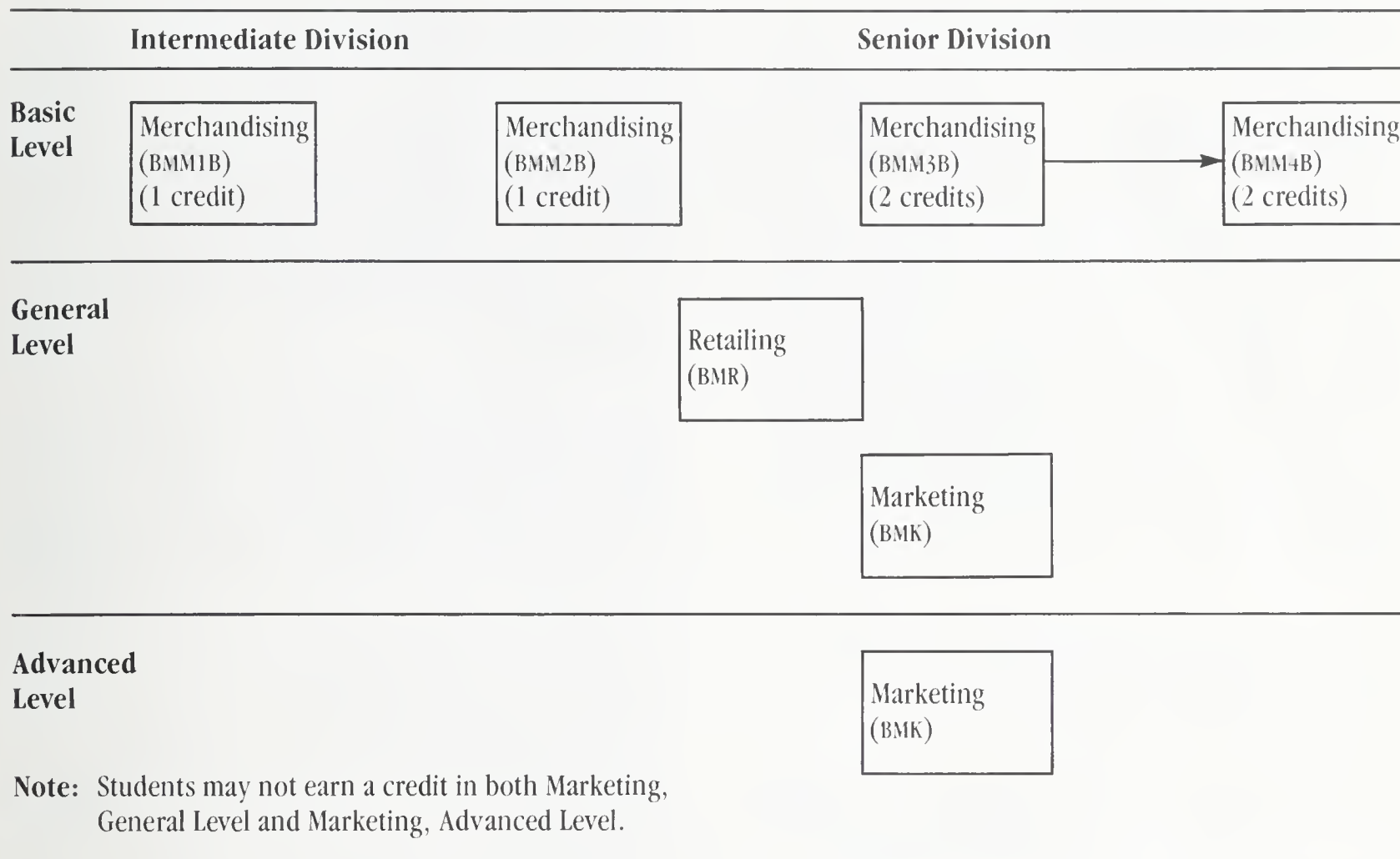
Introduction

Program Description

The primary aim of the marketing program is to provide opportunities for students to develop the strategies and the skills that will help them present a product, service, idea, or themselves effectively in a business environment.

The merchandising and retailing courses in this section of the guideline are designed to stress clerical job-entry skill development. Since each segment of the merchandising industry provides its own specific training programs, unique to its particular consumer market and equipment, the job-preparation and skill-development components of these courses are fairly general in nature. Marketing, General Level stresses the practical application of marketing principles, while Marketing, Advanced Level deals with management issues as they apply in the marketing industry.

As illustrated in the diagram on page 7, this part of the business studies guideline authorizes seven courses for a maximum value of nine in-school credits. Additional credits may be earned through the use of the co-operative education mode of delivery authorized by section 5.11 of OSIS.



Aims

The aims of all marketing courses are to provide students with opportunities to:

- develop an understanding of retailing, merchandising, and marketing concepts, operations, and techniques;
- develop the retailing, merchandising, and marketing skills required for entry-level employment or for further study at a postsecondary institution;
- display tact, courtesy, and diplomacy in dealing with people in a business environment;
- demonstrate those interpersonal skills necessary for success in marketing, merchandising, and retailing activities;
- demonstrate an appreciation of the values and attitudes of others from different cultural or social backgrounds;
- examine current career opportunities and postsecondary courses available in retailing, marketing, and merchandising fields;
- develop effective work habits and organizational skills;
- develop and practise responsible business behaviour;
- understand the central role of the consumer in the marketing process;
- apply marketing concepts and skills through their involvement in school or community activities.

Teaching Strategies

In addition to the general teaching strategies included in the business studies policy document *Policy for Program Planning and Delivery*, teaching strategies for marketing courses are included in this section and in the descriptions of the specific marketing courses that follow.

A school marketing program should not exist in isolation from the community that it serves. The school, the local community, and local business enterprises can make good use of the skills and abilities developed by students in a marketing, retailing, or merchandising program. At the same time, students can benefit from opportunities to use their skills and abilities in realistic applications of marketing principles in their local school or business community.

The marketing classroom should reflect the concepts taught in the marketing program. Displays should be professional in quality and represent both marketing concepts and school applications.

Students should be encouraged to become involved in school and community fund-raising and benefit activities. They should be encouraged to support and promote community information and service facilities as well as local business initiatives.

Personal selling techniques can be developed and applied through assignments involving the sale of yearbook advertisements or through work in a school store. Sales of advertisement space can be organized to provide opportunities for students to work a specific sales territory, with an assigned quota, using a prepared sales kit, and working for such bonus incentives as commissions or awards.

The school store can also be used to provide a relevant experience for students in marketing, merchandising, and retailing courses. Students in merchandising and retailing classes can benefit from such tasks as daily cash control, personnel scheduling, purchasing, displaying, advertising, promoting, and inventory control. Students in marketing can benefit from the use of marketing studies, the development of marketing plans, and the analysis of sales results.

Written assignments should be designed to approximate the kind of writing expected in real-world marketing, retailing, or merchandising activities. Students should be encouraged to practise writing in a marketing environment, assume a particular role, write for a particular audience, use clear and concise language, and follow an appropriate style or format. Students should also be provided with opportunities to prepare résumés and letters of application for marketing or merchandising employment positions.

Effective oral communication skills contribute to the success of an individual in a marketing field. Students should be encouraged to refine their oral-presentation skills by working in small groups where they can share their experiences, receive support, and use the feedback offered by others to improve and perfect their skills. The use of videotape recorders is an excellent way for students to evaluate their own performances and to work on the refining of particular aspects of their oral-presentation abilities (e.g., selling techniques, employment-interview skills, dealing effectively with the public).

A special marketing day for students taking a merchandising, retailing, or marketing course should be considered. Members of the business community could be invited to present information on marketing-related topics or to lead seminars designed to help students to bridge the gap between classroom marketing theory and actual business expectations and challenges in a marketing field. Local community college personnel or representatives from local business organizations can be asked to co-operate on this initiative, and keynote speakers and luncheons could be included.

Students at all levels in a marketing program can use the competitions and challenges provided by Marketing Education Clubs of Canada (MECCA), Ontario Business Education Association (OBEA) contests, and Junior Achievement (JA) to apply their marketing skills and to learn from students in marketing programs at other schools.

Evaluation of Student Achievement

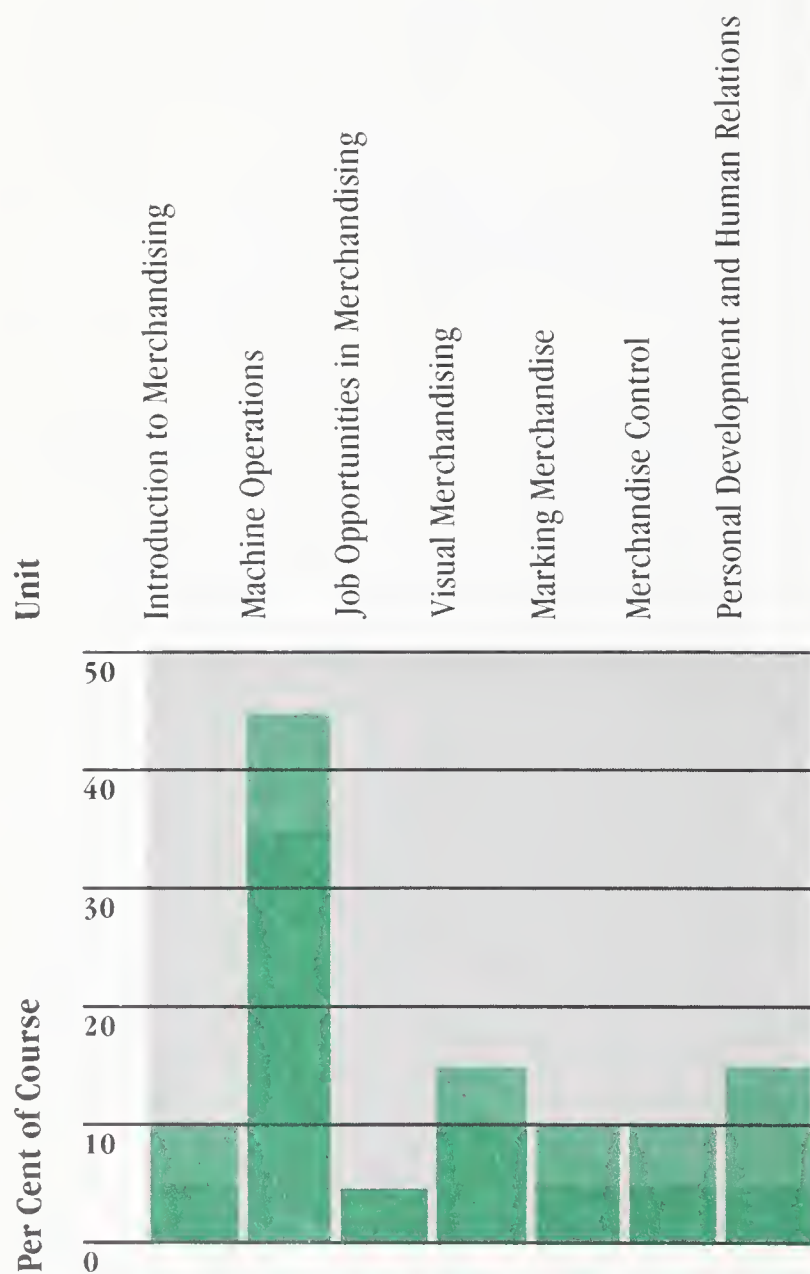
General suggestions for the evaluation of student achievement may be found in the business studies policy document *Policy for Program Planning and Delivery*. The following recommendations relate to all marketing courses. Additional suggestions for assessment are included in the “Teaching and Assessment Strategies” section for each marketing course.

Teachers should clearly outline the policies and procedures for evaluation at the beginning of each course. All evaluation instruments should be designed to reflect both the objectives of the course content outlined in this section of the guideline and the progress made by each student in the class.

Testing should take place on a frequent basis in order to encourage growth in the skills and abilities required for success in a marketing environment. Students should also be encouraged to participate in self- and peer evaluation to identify potential areas for improvement and to reinforce their skill development.

In general, an understanding of marketing principles is quite meaningless without the ability to apply it in appropriate ways. The evaluation of student performance should therefore concentrate on the student’s ability to apply the marketing principles covered in class. Because of the creative and personal aspect of this kind of work, students will feel threatened if they are evaluated according to the professional standards used in a real-world marketing environment. In order to avoid inhibiting student creativity, teachers should be careful to evaluate the learning process for each student as well as the work attitudes and habits demonstrated. Students should be encouraged to identify what is expected of them and then to develop time lines and performance standards to meet these objectives. These time lines and standards and the degree of responsibility assumed should be considered along with the completed task assignment in the evaluation of student performance.

Merchandising, Basic Level (BMM1B)



Introduction

In this basic-level Intermediate Division course, students will examine merchandising activities and develop the practical skills required for success in a merchandising field. Effective business attitudes and human-relations skills will be identified, and students will have opportunities to use the business equipment that is employed in merchandising facilities in the business community. Students may earn a maximum of one in-school credit in this course, for which there is no prerequisite.

This course should provide opportunities for students to:

- identify the role of merchandising in a business environment;
- identify different kinds of merchandising activities in their local business community;
- acquire an introductory understanding of merchandising procedures;
- apply basic arithmetic skills;
- use a calculator and point-of-sale terminal effectively;
- make correct change;
- identify the importance of courtesy, tact, and diplomacy in a merchandising environment;
- practise tolerance and understanding of the attitudes and values of individuals from other cultures and social backgrounds;
- examine the personal work habits and attitudes that are required for success in a merchandising field.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this merchandising course at the basic level and are suggested in addition to the general strategies for teaching and for evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

Since this might be the first business course for many students, teachers are encouraged to approach each topic in a way that will help students to understand the particular issue being examined and to assess its impact in a wider business application. For example, if students are examining a particular way to stock shelves, it is important for them to recognize the need to display merchandise attractively so that it will be sold and profits taken. Teachers should also help students understand the language used in a business or merchandising environment. Students should be encouraged to maintain and use a glossary of terms that they have prepared themselves after group work or class discussion of each topic.

Teachers should take every opportunity to help students understand the objectives of individual business enterprises and to recognize how people who work effectively in a merchandising environment contribute to the success of the business undertaking.

Merchandising courses lend themselves to project assignments, which should be small and not require a great amount of prolonged concentration on one topic. Students should be encouraged to work on projects both individually and in small groups. Teachers should make an effort to interact individually with students while they are working on each assignment and should offer positive reinforcement and support wherever possible. Students should participate in the evaluation of their own assignments and could, perhaps as part of a group, work with the teacher to define the criteria of a project's marking scale.

Students should complete carefully designed review and recall exercises throughout the course. Short tests and quizzes on merchandising principles should be administered frequently, and opportunities should be provided throughout the course for students to mark their own and other students' work.

Merchandising is essentially a practical or applied course, and students should be allowed to experience applications of merchandising principles as often as possible. These can include field trips to identify a variety of store locations and store layouts, case studies to demonstrate the application of merchandising principles or shoplifting controls, and role playing and simulations to reinforce the importance of effective communication skills and an understanding of merchandising principles. Marketing Education Clubs of Canada Association (MECCA) and Junior Achievement (JA) offer programs that can be used to provide students with "real" experiences.

Students may be anxious to use business equipment in a merchandising setting. Care must be taken to identify the rules and operating procedures for its safe and efficient use, and control must be administered to ensure that students are using the equipment efficiently and are acquiring effective business work habits and attitudes.

The importance of effective work habits and attitudes should be continually stressed and reviewed. Films, videotapes, role-playing situations, and guest speakers will provide the realism that students require in order to appreciate the goals of merchandising activities and the skills that they will need for success in this field.

Students should be encouraged to plan their work assignments so that they can make efficient use of their time and energy. Both the planning and the completion of work assignments should be considered in the student-evaluation process. Examinations or a single project should not represent a large percentage of a student's overall mark in this course. Frequent evaluation on a variety of assignments marked out of five or ten marks each will better reflect the achievement of students in this course.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Introduction to Merchandising	5-10
II. Machine Operations	35-45
III. Job Opportunities in Merchandising	5
IV. Visual Merchandising	10-15
V. Marking Merchandise	5-10
VI. Merchandise Control	5-10
VII. Personal Development and Human Relations	5-15

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items outlined in bold face are core content.

I. Introduction to Merchandising



Core Content

Students will:

- describe various merchandising activities in a retail business;**
 - trace the evolution of Canadian retailing;
 - list the major local retail establishments;
 - differentiate between marketing and merchandising activities;
 - establish a glossary of merchandising terms;
- set up a diagram that illustrates the various channels of distribution;**
 - describe the reasons why each channel of distribution is needed;
 - identify particular channels of distribution for specific kinds of products;
- prepare a description of a service business;**
 - outline the differences between a service business and one that deals with products;
 - identify service businesses in their local business community;
- identify the importance of profit;**
 - explain the concept of profit;
 - using a channel-of-distribution diagram, illustrate how products rise in cost through profit taking.

II. Machine Operations

Core Content

Students will:

1. identify the basic operative parts of a calculator;

- operate a calculator, following pre-established safety procedures;
- use correct fingering techniques on all keys and operative parts of a calculator;
- add, subtract, multiply, and divide single- and double-digit numbers;

2. operate a point-of-sale terminal;

- identify the basic parts of a point-of-sale terminal and locate these parts on a variety of cash registers;
- describe correct safety procedures for the operation of a point-of-sale terminal;
- explain the importance of using a cash float;
- list taxable and non-taxable items;
- using a tax table, add tax on taxable items;
- make correct change;
- using legible writing and accurate machine calculations, prepare a variety of bills for items purchased;

3. identify the types of retail businesses that use weigh scales;

- explain the importance of weighing items correctly;
- label the basic parts of a scale;
- weigh various items in a simulated work situation;
- complete exercises that require the use of both a point-of-sale terminal and a weigh scale;

4. operate a computer;

- identify the basic parts and function keys of a computer;
- demonstrate the proper procedures for turning a computer on and off;
- load and run a retailing-business application program.



III. Job Opportunities in Merchandising

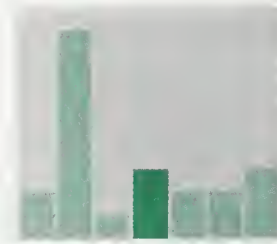


Core Content

Students will:

1. **identify the various types of entry-level opportunities in a merchandising field;**
 - using newspaper advertisements, prepare a poster or a collage of job opportunities;
 - list the characteristics expected of an employee in a merchandising field;
2. **identify the skills required for an entry-level job in merchandising;**
 - complete an employment-application form;
 - participate in a mock employment interview;
 - assess the performance of other students in interview situations;
3. **locate entry-level job opportunities that are available in the local community;**
 - prepare a bulletin-board display of job opportunities.

IV. Visual Merchandising



Core Content

Students will:

1. **identify at least three different types of merchandising displays;**
 - describe the importance of visual displays in merchandising;
 - design an interior or an exterior window display;
 - describe the importance of location in the setting up of a display;
 - design an end-of-aisle display, a counter display, and a wall display;
2. **draw or construct at least three types of display arrangements;**
 - examine local merchandising displays;
 - draw pyramid, stairstep, radiation, repetition, and zigzag displays;

3. illustrate the principles involved in stocking and setting up shelf, bin, rack, and end-of-aisle displays;

- describe the significance of first in, first out (FIFO) merchandising;
- explain how to stock clothing by colour and by size;
- identify the importance of facing shelves so that they will appear full;
- outline the importance of eye-level positions;

4. apply the techniques of gift wrapping;

- maintain an inventory control of items used in gift-wrapping applications;
- demonstrate an ability to use seasonal colours, patterns, and ribbons effectively.

V. Marking Merchandise



Core Content

Students will:

1. identify common methods of marking merchandise;

- describe the equipment used to mark goods;
- demonstrate the correct use of marking equipment;
- identify the importance of computer coding;

2. identify efficient marking methods for a variety of specific goods;

- list the advantages and the disadvantages of various marking devices and techniques;
- match marking devices with specific products;
- describe the marking methods used in a local department store or supermarket;
- operate at least one marking device efficiently.

VI. Merchandise Control

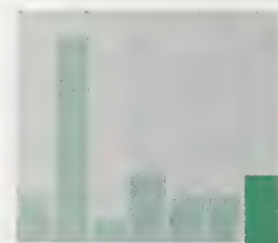


Core Content

Students will:

1. calculate the amount of additional merchandise that must be sold to cover the cost of one stolen item;
 - determine the extra cost to consumers of stolen goods;
2. identify particular areas of a store that provide shoplifting opportunities and recommend measures to counteract them;
 - identify the items that they feel are most likely to be stolen by various age groups;
 - list the various devices and techniques used by retailers to decrease their losses through shoplifting (e.g., mirrors, chains, alarms);
3. list the common characteristics of shoplifters;
4. outline the consequences of shoplifting;
 - describe the role of prosecution in shoplifting situations.

VII. Personal Development and Human Relations



Core Content

Students will:

1. identify positive personality traits that are necessary for success in a merchandising field (e.g., honesty, enthusiasm, confidence, helpfulness);
2. describe appropriate and inappropriate clothing for both a job interview and for particular work situations on the job;
 - identify the merchandising areas that might require a certain type of clothing for safety;
 - identify techniques used to assist individuals to adapt their religious or cultural dress requirements to the clothing restrictions in a particular merchandising area (e.g., the wearing of a hard hat and a turban);
3. describe the importance of personal hygiene in a retailing environment;
 - prepare a checklist of important personal-hygiene practices;
4. describe the importance of effective interpersonal relations;
 - prepare a checklist of effective communication processes, including listening to customer needs; exhibiting courtesy, tact, and diplomacy in their relationships with customers and fellow workers; and speaking clearly and concisely;

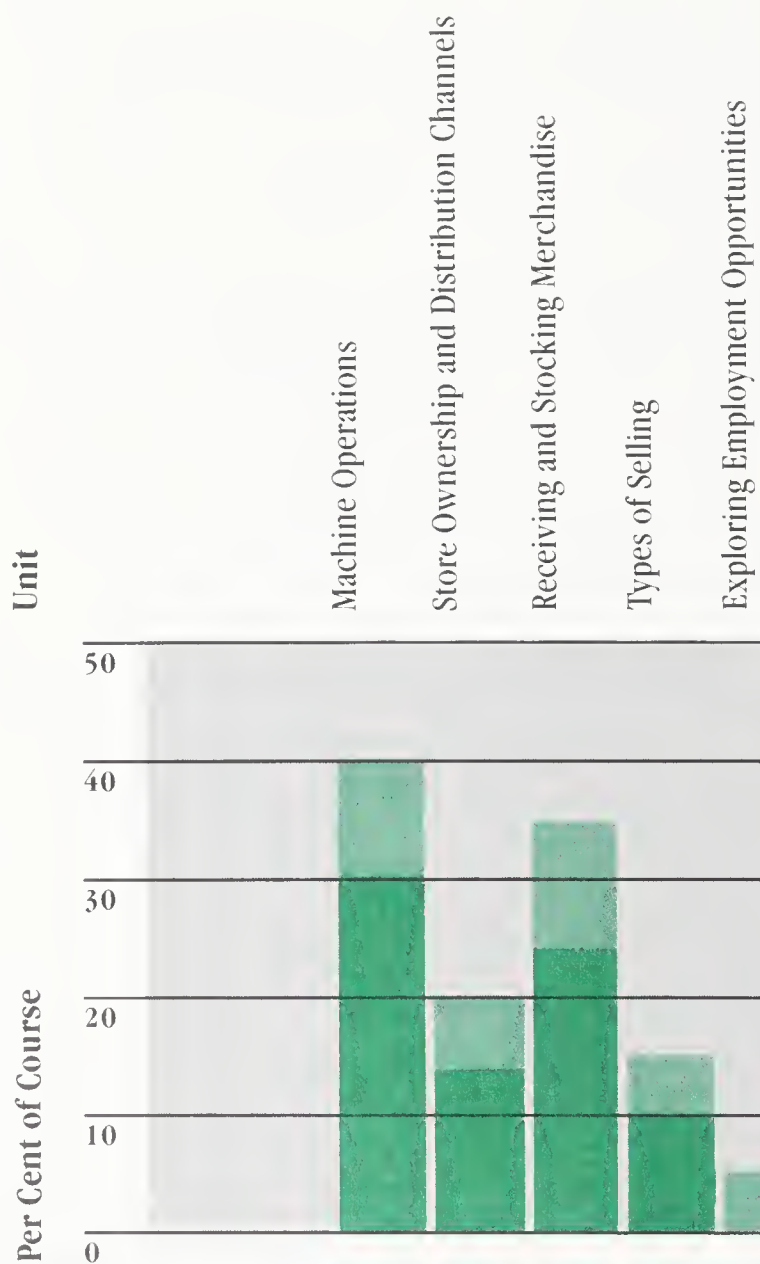
5. identify the importance of active listening and feedback in the communication process;

- demonstrate active listening and feedback activities;
- role-play active listening and feedback situations using salesperson and customer scenarios;

6. develop solutions for specific human-relations problems found in the workplace;

- assess the effect of absenteeism and tardiness on the workplace;
- outline how effective interpersonal relationships with customers, employers, and fellow workers can increase productivity and profit margins;
- demonstrate a tolerance and an understanding of the importance of the cultural or religious values and attitudes of others.

Merchandising, Basic Level (BMM2B)



Introduction

In this basic-level Intermediate Division course, students will develop and apply the skills and attitudes necessary for success in a merchandising field. Effective business and human-relations skills and attitudes will be examined, and students will have opportunities to use merchandising equipment in business applications. Students may earn a maximum of one in-school credit in this course, for which there is no prerequisite.

This course should provide opportunities for students to:

- investigate the application of merchandising principles in their local business community;
- investigate the procedures used to receive, check, and mark goods in a merchandising environment;
- apply introductory merchandising concepts and procedures;
- apply basic arithmetic skills to merchandising activities;
- use a calculator, a point-of-sale terminal, and a computer effectively in a merchandising setting;
- practise cash routines and make correct change;
- demonstrate courtesy, tact, and diplomacy in dealing with, and an appreciation of the values and attitudes of, those from cultural or social backgrounds that are different from their own;
- practise effective personal work habits and attitudes and recognize their relationship to success in a merchandising field.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this merchandising course at the basic level and are suggested in addition to the general strategies for teaching and evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

Students should be encouraged to develop confidence in their ability to perform merchandising functions. Teachers should ensure that the core content is delivered in small units and that it is approached in a practical rather than a theoretical manner. Students should be involved in activities that require them to perform merchandising routines. They may then be required to assess the effect of their accomplishments and to identify and review the aspects of theory that they learned in the application. Teachers should encourage students to build on their successes and should offer frequent positive reinforcement.

Students should continue to use and update their glossary of merchandising terms and to develop their writing, reading, listening, and speaking skills as they complete merchandising activities.

The use of field trips, simulations, role playing, and programs provided by MECCA, OBEA, or JA will help provide students with an understanding of merchandising applications.

Teachers could establish an evaluation procedure that involves the use of student logs. Students could be asked to identify each activity assigned, note the time it took to complete the activity, and include comments related to the success or failure of the assignment, the manner in which they followed policies and procedures, and the application of effective interpersonal skills and work habits in the assignment. Teachers would then have a daily record of performance on which to base a major component of students' final evaluation. Teachers would also have a vehicle for assessing whether particular students require specific help and a measure for assessing students' development and improvement in a variety of skill-development areas. Short quizzes, reviews, and tests are also valid for assessing student performance.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Machine Operations	30-40
II. Store Ownership and Distribution Channels	15-20
III. Receiving and Stocking Merchandise	25-35
IV. Types of Selling	10-15
V. Exploring Employment Opportunities	5

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items outlined in bold face are core content.

I. Machine Operations

Core Content

Students will:

1. use a calculator to add, subtract, and multiply one- and two-digit numbers;

- recognize and use correct fingering techniques;
- use the memory keys;
- proofread and correct errors;
- describe the proper care of a calculator;
- use a calculator quickly and efficiently;

2. use a point-of-sale terminal efficiently;

- label the parts of a point-of-sale terminal;
- change the date, tape, and ribbon in a point-of-sale terminal;
- describe appropriate safety precautions for the use of a point-of-sale terminal;
- enter cash and credit transactions;
- correctly record a sales transaction and a credit transaction, using a credit-card imprinter;
- correctly interpret the information printed on a customer's receipt tape;
- correctly calculate sales tax, using tax-exempt and sales keys;
- identify taxable and non-taxable merchandise;
- effectively use sales-tax-exemption charts;

3. make correct change at a sales counter;

- make change using the "add-up" method or the "amount-tendered" key;
- list the amount of money required to purchase a roll of each different denomination of coin;
- roll coins and prepare cash for bank deposit;

4. balance point-of-sale receipts;

- describe the correct procedure for receiving and preparing a cash float;
- complete a cash-register-balance report;

5. correctly use a weigh scale;

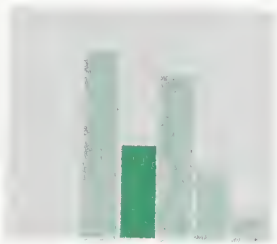
- label the parts of a scale;
- describe why weighing is essential to effective cost controls;
- describe why weighing is important to a store's profit picture;
- weigh a variety of merchandise;

6. demonstrate the effective use of a computer in a merchandising application;

- describe the safety procedures for the effective use of a computer;
- label the important parts of a computer;
- load and run a simple retail-related software program.



II. Store Ownership and Distribution Channels



Core Content

Students will:

1. **identify a variety of store-ownership organizations;**
 - describe the important features of a sole proprietorship, a partnership, a corporation, and a franchise;
 - chart the advantages and the disadvantages of each;
 - draw a map of their local business community and identify a variety of different kinds of store ownership;
 - identify the advantages and the disadvantages of each kind of store ownership from the customer's point of view;
2. **demonstrate an understanding of merchandising terms;**
 - correctly use such terms as the following: packaging, wholesale, warehouse, sales promotion, advertising, retailing;
3. **identify the importance of profit in business;**
 - describe the contribution that employees make to a store owner's profits;
 - trace the importance of store location and appearance to the profits of a particular business;
4. **chart a variety of channels of distribution;**
 - identify the products that would be best served by a particular channel of distribution;
5. **identify a variety of distribution methods (i.e., one-step, two-step, and three-step marketing);**
 - identify the value-added concept in relation to the repackaging of goods in bulk into individual portions;
 - identify legislation that affects the repackaging of perishable and non-perishable items.

III. Receiving and Stocking Merchandise

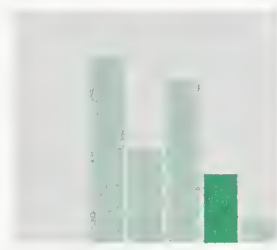


Core Content

Students will:

1. **process the forms used in receiving and checking merchandise;**
 - use a flow chart to identify the distribution stages from the receipt to the storage of goods;
 - complete purchase orders, invoices, and shipping receipts;
 - describe the importance of accuracy in these forms;
2. **describe a variety of systems used to check merchandise (e.g., direct, blind, spot check);**
 - describe the use of electronic checking procedures;
 - complete the forms required for checking merchandise;
 - check supplies as they are received in the school;
3. **demonstrate the correct way to lift, carry, and place heavy merchandise;**
 - identify the parts of the body that should be used to support heavy weights;
4. **identify ethical procedures for the receiving and checking of goods;**
 - describe what is meant by *shortage* and *overage*;
 - prepare invoices that illustrate how to show overage, shortage, or merchandise that was wrongly shipped;
5. **use common methods to mark merchandise;**
 - label the various parts of each kind of marking device;
 - describe the most efficient marking method for specific goods;
 - identify appropriate locations for price markings;
 - list the marking devices used in the local business community and the locations for the price markings;
6. **describe common stockkeeping procedures;**
 - explain the use of first in, first out (FIFO) in stockkeeping procedures;
 - explain the use of last in, first out (LIFO) in stockkeeping procedures;
 - identify the meaning of the various symbols that indicate perishable, breakable, corrosive, or flammable merchandise;
 - describe appropriate packaging procedures for materials that are perishable, breakable, corrosive, or flammable;
 - describe the use of code slates and textile and electronic codes;
 - describe a variety of security measures for the storing of expensive goods.

IV. Types of Selling

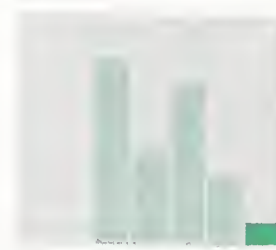


Core Content

Students will:

1. **describe the characteristics that are important for a successful selling career;**
 - identify the importance of effective interpersonal skills;
 - identify the importance of effective attitudes and work habits;
 - describe the procedures used in telephone sales, door-to-door sales, and mail-order sales;
 - identify products that are sold by telephone, door to door, and by mail order;
2. **role-play selling routines;**
 - identify the advantages and disadvantages of different selling routines;
3. **correctly parcel and wrap merchandise;**
 - identify a variety of materials used to wrap merchandise.

V. Exploring Employment Opportunities



Core Content

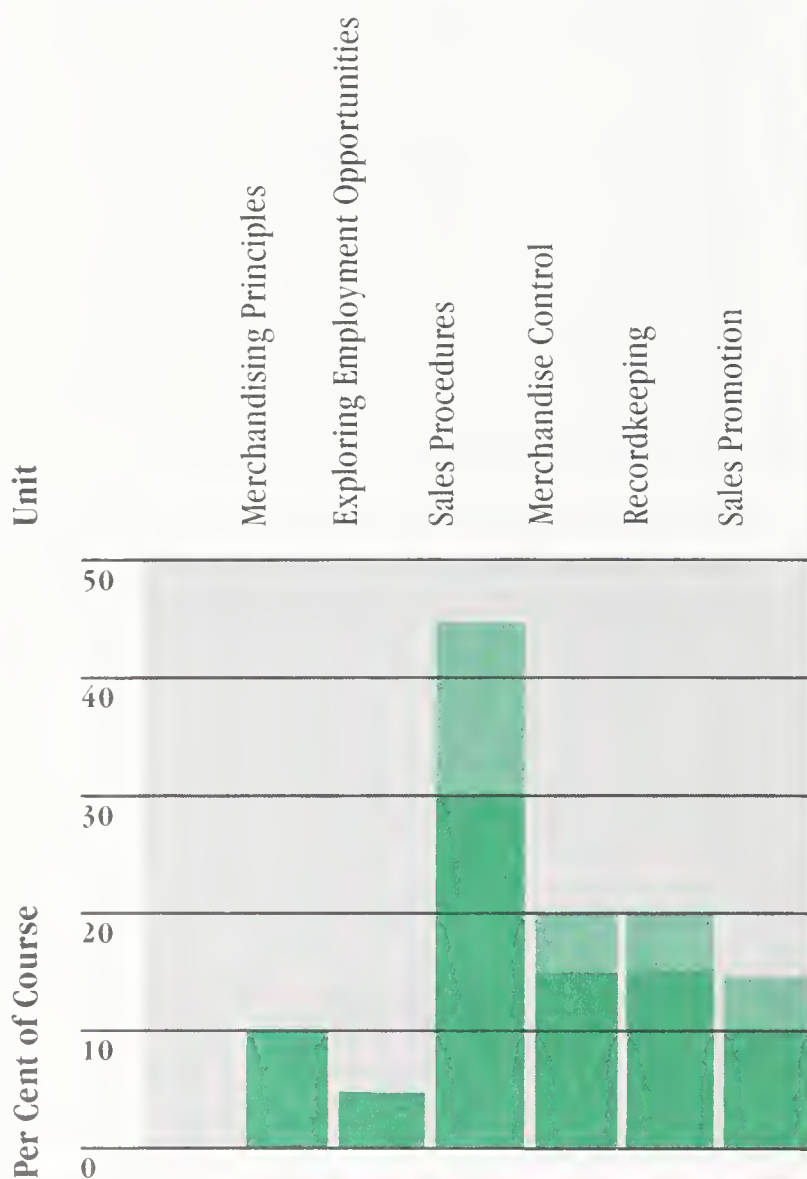
Students will:

1. **list employment opportunities in their local business community;**
 - identify the skills and abilities that are sought;
 - list their own skills and abilities;
 - identify the kind of work that they would like;
 - identify the kind of work of which they feel capable;
 - prepare a wallet-sized card listing their personal statistics for use in completing an application form;
2. **demonstrate effective job-search skills;**
 - prepare a simple résumé and letter of application;
 - role-play an interview situation;
 - complete a variety of employment-application forms.

Merchandising, Basic Level (BMM3B)

Introduction

In this basic-level Senior Division course, students will practise the skills required for working in a retail store. They will identify and apply the correct procedures for working at a sales counter, making accurate change, stocking shelves, and dealing with customers. They will also apply effective business attitudes and human-relations skills and will have opportunities to use business equipment that they might encounter in a retail selling position. Students may earn a maximum of two in-school credits in this course, for which there is no prerequisite.



This course should provide opportunities for students to:

- examine and apply store-operating procedures, including inventory control, pricing, and record-keeping;
- apply the procedures used to receive, check, and mark goods in a retail-store environment;
- practise calculator, point-of-sale-terminal, and computer skills;
- practise cash routines and make correct change;
- demonstrate courtesy, tact, and diplomacy in dealing with, and an appreciation of the values and attitudes of, those from cultural or social backgrounds that are different from their own;
- practise effective personal work habits and attitudes and recognize their importance to success in a merchandising field;
- investigate job opportunities in merchandising;
- develop the skills required to apply for, get, and keep a job in a merchandising field.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this merchandising course at the basic level and are suggested in addition to the general strategies for teaching and evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

A continued emphasis on applications of merchandising principles through an involvement with MECCA, OBEA, and JA programs is appropriate. As well, students in this course should be encouraged to apply their understanding of merchandising principles in work-experience and co-operative education programs. Teachers should establish contact with the business community and promote the concept that real-work situations provide students with opportunities to apply the principles covered in class in an environment where there is someone other than their teacher to supervise their work.

It is important for the teacher to maintain regular contact with the student on a work-placement site in order to provide the support and reinforcement that are essential to a productive learning environment. Students should not feel isolated on the job. They should also understand that their success or failure in a particular work placement will not result in their success or failure in their merchandising course. Teachers should emphasize that a work or co-operative education experience is another opportunity to apply what has been covered in class and should be considered as another kind of learning environment.

Students should continue to develop and improve their communication skills, maintain and use their glossary of business and merchandising terms, and practise the listening, speaking, writing, and reading activities that they will be exposed to in a merchandising environment.

The student-assessment procedures established for previous merchandising courses should be maintained, with an increased emphasis placed on student abilities to work independently on assigned tasks and to meet predetermined performance expectations.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Merchandising Principles	10
II. Exploring Employment Opportunities	5
III. Sales Procedures	30-45
IV. Merchandise Control	15-20
V. Recordkeeping	15-20
VI. Sales Promotion	10-15

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items outlined in bold face are core content.

I. Merchandising Principles



Core Content

Students will:

- 1. describe the effect of supply and demand on the price of a product;**
 - role-play situations or use case studies and simulations to illustrate the effects of supply and demand;
 - draw a simple supply-and-demand curve;
- 2. chart the main types of store ownership and show the major advantages and disadvantages of each;**
 - visit stores in the community that are examples of each type of ownership to determine their advantages and disadvantages;
- 3. locate examples of a sole proprietorship, partnership, local chain, national chain, and franchise operation on a map of their local business community;**
 - identify the advantages and disadvantages of their particular locations in the community;
- 4. identify the advantages and the disadvantages of a variety of store-layout plans;**
 - draw a variety of store-layout plans;
 - identify store-layout plans for particular kinds of retail stores.

II. Exploring Employment Opportunities



Core Content

Students will:

- 1. list the job opportunities in a merchandising field;**
 - prepare a bulletin-board display of newspaper ads, employment listings, and any other related material in order to identify as many job opportunities as possible;
- 2. identify the components of a successful job-application procedure;**
 - prepare or update a wallet-sized data card to use when completing a job-application form;
 - identify their qualifications and educational experience for particular jobs advertised in the local newspaper;
 - prepare a simple résumé;
 - complete job-application forms, using their data cards;
 - practise interview techniques;
- 3. outline the importance of personal appearance for work in a retail store;**
 - develop a checklist of clothing and hygiene requirements;
- 4. identify a variety of resources available to people looking for work (e.g., newspaper advertisements; employment, government, and social agencies; employed friends and family members).**

III. Sales Procedures

Core Content

Students will:

1. describe the major steps in making a sale;

- role-play selling situations with other members of the class;
- evaluate their individual sales performance as well as those of fellow students involved in the role-playing situations;
- interview sales personnel to identify important aspects of successful selling;
- prepare sales presentations for a variety of products;

2. describe different styles of customer behaviour;

- role-play selling situations with hesitant, hurried, knowledgeable, and insecure customers;
- prepare sales presentations designed to put each of these types of customer at ease;

3. design a sales simulation that requires the use of all of the functions of a point-of-sale terminal;

- demonstrate the efficient operation of major keys such as the following: multiple items, no sale, charge, exchange, refund;
- use correct fingering techniques and proofread for accuracy;
- take an end-of-day report reading from a point-of-sale terminal;

4. prepare a point-of-sale-terminal float;

- prepare floats for cafeteria and school-store use;

5. complete an accurate cash-control report;

- enter sales and balance cash using a cash-control report;

6. ring up sales and make correct change;

- solve problems that occur when incorrect change is given to a customer;
- make change in Canadian and American currency;
- accurately use the current-rate-of-exchange, par-value, premium, and discount features available on point-of-sale terminals;

7. complete accurate and legible sales bills;

- complete service bills from shops within the school (e.g., restaurant, auto-body, hairdressing);

8. use correct charge-card procedures to ring up sales and credit notes;

- identify the major charge cards in use;
- list the procedures for processing a sale using a charge card;
- outline procedures for checking the validity of a charge card;
- correctly use such terms as the following: expiry date, signature, delinquent card file;
- explain the process for checking whether a card has been stolen, is delinquent, or has expired;
- use a charge-plate imprinter;
- complete the written part of a charge slip accurately and legibly;



9. outline the basic telephone techniques used in a sales environment;

- correctly use a telephone directory to locate telephone numbers;
- list the rules for the effective use of a telephone;
- interview representatives from business to determine appropriate telephone use;
- role-play telephone situations to develop clear, concise, and polite telephone procedures;

10. differentiate between telephone order taking and telephone selling;

11. outline the accepted ethics of merchandising;

- identify the application of ethics to merchandising;
- describe selling tactics such as the following: bait and switch, pyramid selling, misleading advertising;
- using the Criminal Code, identify the possible penalties for these practices;

12. prepare a job description for each position in the operation of a school store, cafeteria, or receiving area;

- prepare an organization chart showing all positions of responsibility;
- maintain accurate inventory and financial records;
- prepare floats and bank deposits;

13. outline the advantages to the retailer of buying on consignment.

IV. Merchandise Control

Core Content

Students will:

1. assess the importance of maintaining an adequate and balanced inventory;

- determine different kinds of inventory for different seasons;
- prepare a diagram that outlines the stages in the fashion or product life cycle of a product or service;

2. describe a variety of retail inventory-control procedures;

- use a computer-software program to control an inventory;
- apply a retail inventory-control procedure to the stocking and inventory control of a school store or warehouse area;

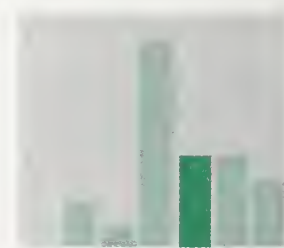
3. apply a variety of retail inventory procedures;

- prepare receiving reports;
- mark inventory for sale;
- stock goods;

4. describe the significance of the Universal Product Code (UPC) and relate it to the concept of computerized pricing;

5. outline the causes and effects of shoplifting and pilfering;

- describe security procedures used in local retail operations;
- recommend ways to improve customer and employee attitudes towards shoplifting.



V. Recordkeeping

Core Content

Students will:

1. **explain the importance of a recordkeeping system;**
 - identify the problems that can be created by ineffective recordkeeping;
2. **complete basic recordkeeping operations;**
 - indicate the movement of inventory and maintain a running balance on a stock-record card;
 - use a computer software program for inventory control;
 - prepare deposit slips and keep accurate banking records;
 - prepare cash receipts and maintain accurate records of daily sales;
3. **identify the basic receiving procedures used in a retail operation;**
 - draw a simple flow chart showing the movement of goods from receipt to sale.

VI. Sales Promotion

Core Content

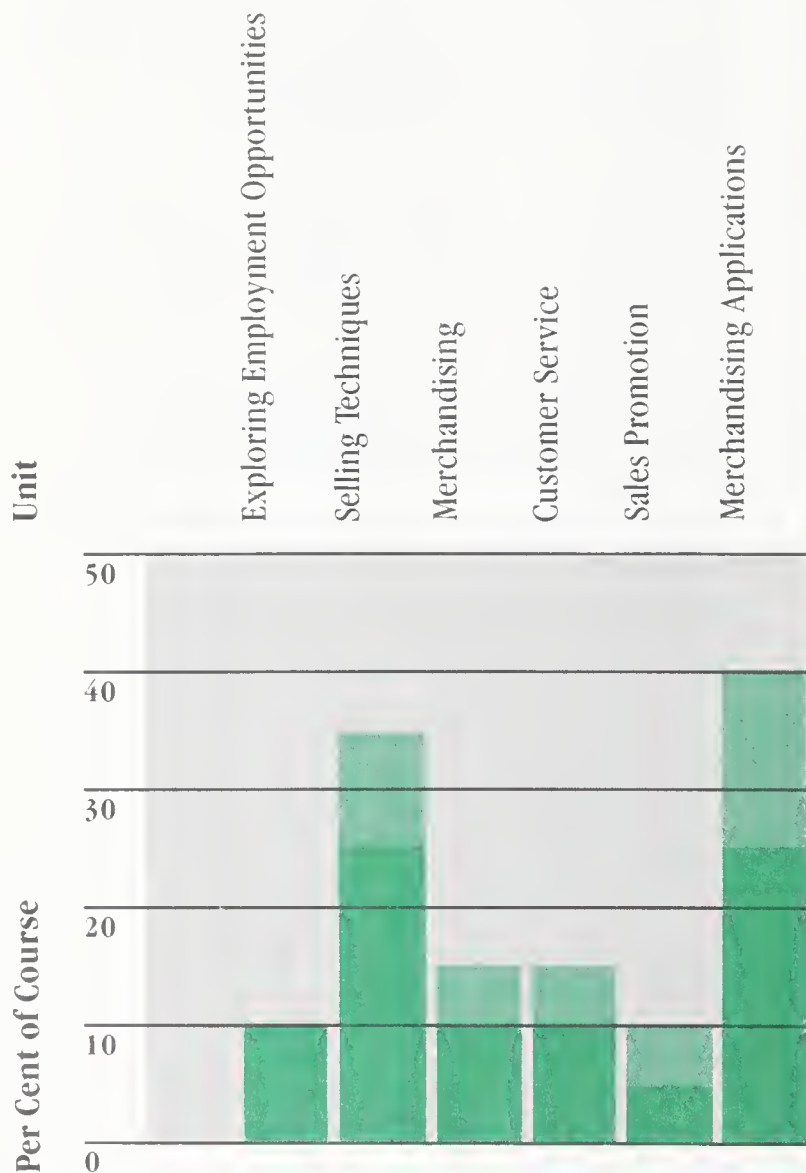
Students will:

1. **identify the purpose of advertising;**
 - describe a variety of advertising media, including the school public-address system, bulletin boards, and school-yearbook advertisements;
2. **identify major types of advertising;**
 - examine a variety of advertisements, including newspaper ads, outdoor signboards, television commercials, and mass mailings, to determine the effectiveness of each;
3. **describe a variety of sales-promotion techniques, such as the following: trade shows, point-of-sale material, contests, give-aways, samples, specials from the wholesaler, coupons, premiums;**
4. **develop criteria for effective sign making or advertisement layout;**
 - visit sign-making facilities in the community to observe the processes used;
 - prepare a sign announcing a special school event or promotion.

Merchandising, Basic Level (BMM4B)

Introduction

In this basic-level Senior Division course, students will identify the job attitudes, habits, knowledge, and skills required for success in retail-store work assignments and will practise a variety of selling techniques. Job opportunities will be examined, and students will apply job-application and interview techniques. Students may earn a maximum of two in-school credits in this course, for which a Senior Division merchandising credit at the basic level is a prerequisite.



This course should provide opportunities for students to:

- practise store-operating procedures, including inventory control, pricing, recordkeeping, selling, and the handling of customer concerns;
- apply the principles of advertising, packaging, pricing, and sales promotion in a retail-store environment;
- apply calculator, point-of-sale-terminal, and computer skills;
- practise cash routines and make correct change;
- demonstrate courtesy, tact, and diplomacy in dealing with, and an appreciation of the values and attitudes of, those from cultural or social backgrounds that are different from their own;
- practise effective personal work habits and attitudes and recognize their importance to success in a merchandising field;
- investigate job opportunities in merchandising.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this merchandising course at the basic level and are suggested in addition to the general strategies for teaching and evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

A considerable amount of time should be spent in applying the principles covered in class to actual merchandising activities. Students should be encouraged to evaluate their abilities to perform routine merchandising tasks and to note these abilities so that they can use them when they look for employment. Teachers should take every opportunity to reassure students who lack confidence in their abilities and help them to examine the job opportunities that suit their particular skills and abilities. Role playing and the videotape recording of interview situations will be very useful to students in this regard, as will the preparation of a wallet-sized data card that contains all of the information that students will need to refer to when they complete an employment-application form.

Practice in using business equipment is extremely important in this program. Every opportunity should be taken to encourage students to measure their performance with calculators, point-of-sale terminals, and computer applications and to set and work towards goals for improvement.

All assignments should include opportunities for students to apply effective communication and interpersonal skills in a merchandising environment.

Opportunities for co-operative education, work experience, and involvement in MECCA, OBEA, and JA programs can be used to help students in this course make the transition from school to employment.

The student-assessment procedures established for previous merchandising courses should be maintained with the expectation that students will work independently and responsibly on assigned tasks, that they will take an increasingly more responsible role in the determination of performance criteria, and that they will meet predetermined performance objectives.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Exploring Employment Opportunities	10
II. Selling Techniques	25-35
III. Merchandising	10-15
IV. Customer Service	10-15
V. Sales Promotion	5-10
VI. Merchandising Applications	25-40

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items outlined in bold face are core content.

I. Exploring Employment Opportunities



Core Content

Students will:

1. **list current job opportunities available in a retail merchandising field;**
 - describe the qualifications required for each;
 - determine their qualifications with respect to each position;
2. **identify the resources available to them when looking for employment;**
 - identify the importance of newspaper advertisements, Employment Canada listings of job opportunities, the school's student guidance facilities, and friends and families in the work force;
 - post important information for job seekers on a class bulletin board;
3. **identify opportunities for non-traditional employment;**
 - describe the importance of equal-opportunity employment;
 - interview people in non-traditional areas of employment;
4. **complete the procedures involved in applying for work;**
 - complete a variety of employment-application forms;
 - prepare or update a personal résumé;
 - write a letter of application;
 - prepare a summary of factors that they should consider in preparing for an interview (e.g., the time required to travel to the interview, appropriate dress, the need for adequate rest beforehand, the preparation of a data card, the preparation of answers to questions that might be asked);
 - practise effective interview techniques;
5. **describe the purpose of pre-employment tests;**
 - complete a variety of sample pre-employment tests;
6. **list reasons why job applications may be unsuccessful;**
7. **identify the attributes of an effective employee;**
 - list common reasons for job dismissal;
8. **identify the importance of effective interpersonal skills on the job;**
 - identify opportunities for the effective demonstration of interpersonal skills in the school environment;
 - identify factors that foster poor morale (e.g., gossiping, cheating, lack of team spirit).

II. Selling Techniques

Core Content

Students will:

1. differentiate between a consumer's wants and needs;

- list various wants and needs and associate them with particular products;
- identify the primary buying motives of a variety of customers;

2. list the sources of product information;

- prepare a bulletin-board display of packaging materials, labels, product samples, pamphlets, consumer reports, and advertisements that would assist a consumer in making appropriate choices;

3. identify the importance of selling activities to local and national economies;

4. identify the importance of employees' understanding store policies, services, and advertisements;

- examine actual store policies in the local community;

5. identify the major components of a sales presentation;

- identify the importance of the customer to the retail store;
- describe the attitudes that effective retail employees should exhibit towards customers;
- identify different approaches to a sale;
- describe the importance of not stereotyping potential customers (e.g., male/female, labourer/professional, young/old);
- identify the importance of determining the wants and needs of customers;
- role-play sales presentations and evaluate both their own presentations and those of their peers;
- identify the indicators of the successful participation of a customer in a sales presentation;

6. identify the importance of a salesperson's appearance, language, and attitude during a sales presentation;

7. identify the major objections to a sale;

- discuss the objections that customers raise regarding price, manufacturer, product, salesperson, and immediate purchase (as opposed to further consideration);
- identify appropriate responses to a variety of objections;
- differentiate between an objection and an excuse;

8. identify a variety of methods for closing a sale;

- identify the importance of timing;
- practise a variety of closing situations (e.g., assumption, conditional, premier, last-chance);

9. identify a variety of ways to increase sales;

- outline the importance of substitute selling;
- summarize the advantages of substitute selling to the store, the salesperson, and the customer.



III. Merchandising

Core Content

Students will:

1. **review and explain the importance of a good recordkeeping system;**
 - identify the application of recordkeeping to sales, purchases, inventory control, cost of goods sold, and profit and loss;
2. **correctly use stock-requisition and purchase-order forms;**
 - label the various parts of each;
 - maintain stock-record cards, using a running balance;
 - diagram the movement of goods into and out of a store;
 - use an inventory-control computer software program;
3. **prepare a simple income statement;**
 - identify management's use of an income statement;
4. **identify the basic receiving procedures used in a retail store;**
 - prepare a flow chart or diagram of the receiving procedures used in a variety of retail operations;
 - receive merchandise in a school store or cafeteria;
5. **trace the use of basic receiving forms (e.g., purchase orders, packing slips, receiving reports, inventory cards);**
6. **identify the methods used to check merchandise;**
 - apply direct, blind, and spot-check methods;
7. **identify the meaning of such terms as the following: house brand, national brand, generic brand;**
 - chart the differences in the cost, quality, and reliability of each type of brand of a particular product;
8. **identify the components of an effective package;**
 - label the parts of an appropriate label;
 - identify the meaning of a variety of coding systems;
 - identify the use of particular packaging materials for a variety of products;
9. **describe the use of the universal product code;**
 - visit a community supermarket and find examples of the use of the universal product code.



IV. Customer Service

Core Content

Students will:

1. **identify the procedures used by retailers to process credit applications;**
 - identify a variety of charge cards in use;
 - complete sample credit-application forms;
 - consider the potential problems that can arise from credit-card use;
 - identify how credit limits are established;
2. **describe the purpose of a three-part credit sales slip;**
 - identify the different sections and outline the use of each;
 - trace the procedures for processing credit sales;
3. **identify the steps used by retailers to deal with customers who default on their payments;**
 - identify the role of a credit department;
 - apply interest charges to overdue accounts;
 - define the role of a collection agency;
4. **describe the use of sales contracts;**
 - identify the legal requirements involved;
 - outline the rights and obligations of the customer and the retailer after a contract has been signed;
 - differentiate between warranties and guarantees;
5. **identify the problems that might arise from exchanges of and refunds for returned merchandise;**
 - identify a variety of store policies with respect to the return or exchange of merchandise;
6. **identify the procedures for checking the ownership of, and identifying liens on, merchandise offered for sale;**
 - describe the procedure for searching a title;
 - identify a variety of consumer-protection practices;
7. **identify a variety of ethical and unethical consumer and retailer practices;**
 - outline the importance of the fair representation of merchandise, value, quality, use, and warranty;
 - describe such practices as price wars, the use of loss leaders, libel, slander, business defamation, and copying;
8. **prepare a school-store employee-conduct manual;**
 - identify the rationale for dealing courteously with fellow employees and customers, displaying loyalty towards the employer, and following store rules and regulations;
9. **describe the effect of shoplifting on retailers and consumers;**
 - identify the penalties related to shoplifting;
 - identify various controls imposed by retailers to prevent shoplifting;
 - outline the responsibility of the employee to prevent shoplifting.

V. Sales Promotion



Core Content

Students will:

1. **identify the uses of marketing research in a merchandising field;**
 - examine a market-research report;
 - describe a variety of market-research procedures (e.g., surveys, observations, experiments);
 - prepare and use a market-research questionnaire to determine product or attitude trends;
2. **identify a variety of advertising activities used by merchants in the local business community;**
 - interview local retailers to determine both their preferences in advertising and their reasons for these preferences;
 - categorize specific merchandise areas by the advertising media most commonly used;
3. **identify the advantages and the disadvantages of a variety of types of advertising;**
 - interview parents, friends, or acquaintances to identify the advantages or disadvantages of particular advertisements;
4. **create an advertisement for the school store or for a special school function;**
 - assess the impact of a variety of advertisements from a representative selection of media;
 - prepare, edit, and proofread sample advertisements;
 - use a computer-graphics software program to create advertisements.

VI. Merchandising Applications



Core Content

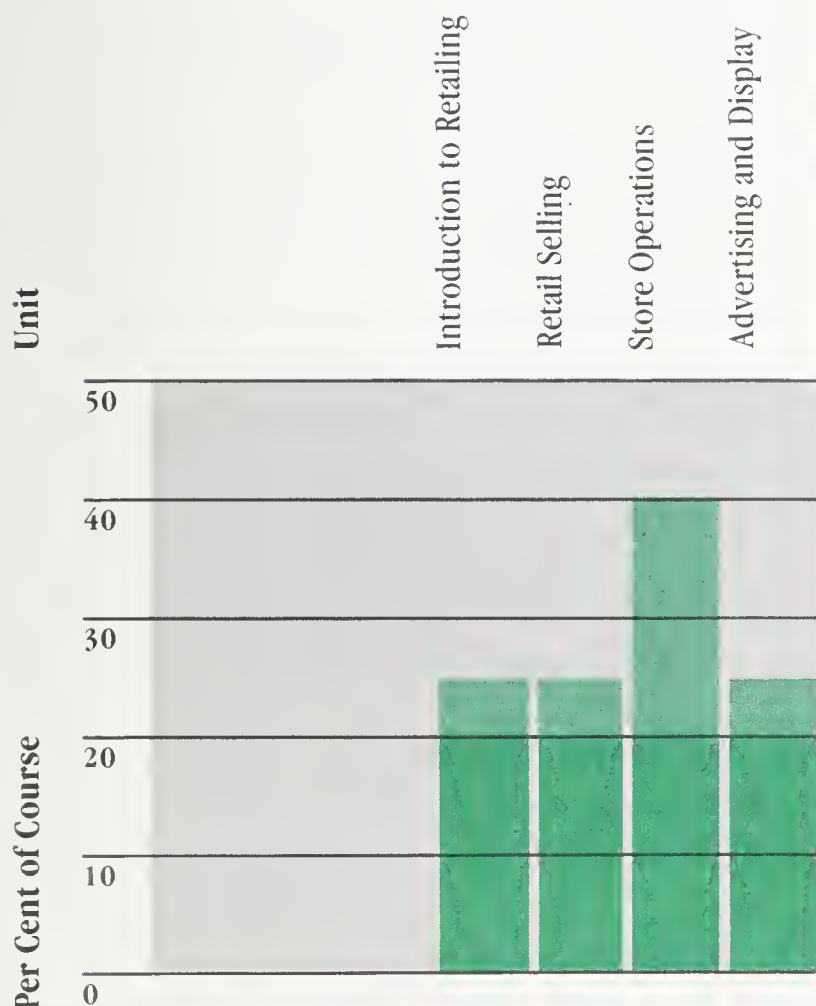
Students will:

1. **list essential personal attributes for on-the-job success;**
2. **participate in merchandising activities that are designed to meet the learning objectives of a merchandising program;**
3. **maintain a daily log that indicates hours worked, activities performed, and both the teacher's and the student's assessment of the experience;**
4. **perform the calculations required in merchandising applications correctly and efficiently;**
5. **correctly complete all required forms;**
6. **successfully avoid common causes of error (e.g., illegibility, carelessness, distraction).**

Retailing, General Level (BMR)

Introduction

This course, which may be offered in either the Intermediate or Senior Division at the general level, will help students to acquire and apply the knowledge, skills, and attitudes required for job entry in the retail industry. Students will examine and practise retail-store routines and operating activities. Students may earn a maximum of one in-school credit for this course, for which there is no prerequisite.



This course should provide students with opportunities to:

- develop an understanding of the terminology and practices used in a retailing environment;
- demonstrate an appreciation of the customer's needs and wants;
- understand and apply the principles of responsible business ethics;
- practise effective work habits, attitudes, and interpersonal skills in a retailing environment;
- demonstrate courtesy, tact, and diplomacy in dealing with, and an appreciation of the values and attitudes of, those from cultural or social backgrounds that are different from their own;
- apply sales and promotional skills in a retail setting;
- examine and apply routine store-operating procedures;
- identify the role of merchandising in a business environment;
- identify different kinds of merchandising opportunities in their local business community.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this retailing course at the general level and are suggested in addition to the general strategies for teaching and evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

Teachers should approach each topic in this course in a way that will develop students' understanding of the particular issues being examined and encourage them to assess the impact of these issues in a wider business application. For example, if students are examining a particular way to stock shelves, it is important for them to recognize the need to display merchandise attractively so that the merchandise will be sold and profits taken. Teachers should encourage students to appreciate the goals established by the retailing industry and to recognize how they can contribute to the success of an undertaking.

Students should be encouraged to maintain and use a glossary of terms that they have prepared themselves after group work or a class discussion on a topic.

Retailing, General Level is a practical or applied course. Field trips (to identify a variety of store locations and store layouts), case studies (to demonstrate the application of retailing concepts and principles), and role playing and simulations (to reinforce the importance of effective communication skills and work habits) are particularly important teaching strategies.

Students can also benefit from a close working relationship with their local business community through field trips, the visits of guest speakers, the preparation of special window displays for local merchants, the conducting of retailing surveys, and the promoting of special events. Such activities, as well as the use of films and videotapes, will provide the realism that students require in order to appreciate the goals of retailing and to identify the skills that they will need for success in this field.

MECCA (Marketing Education Clubs of Canada Association), OBEA (Ontario Business Education Association), and JA (Junior Achievement) have excellent programs and contests that can be used to provide students with "real" experiences. Where possible, students should be encouraged to form a MECCA chapter and to participate in competitive activities and retailing applications.

The use of a school store is an excellent vehicle in this regard, since it provides students with opportunities to apply the theory and procedures learned in the classroom to such areas as daily cash control, personnel scheduling, the purchasing and displaying of goods, advertising and the promoting of special merchandise, and inventory control.

Effective work habits and attitudes should be continually stressed and reviewed. Students should be encouraged to plan their work assignments in a way that will enable them to make efficient use of their time and energy. Both the planning and the finished product of such assignments should be evaluated.

Creativity in retailing project work can be achieved only when students are encouraged to take risks. Since the evaluation of their artwork or their printing abilities could impose unnecessary constraints on their ability to create retailing innovations, teachers are encouraged to assume that professional artists or display technicians would be involved in the preparation of the final copy and to evaluate students' concepts, ideas, designs, or innovations rather than the technical aspects of the preparation of advertising copy.

Wherever possible, real business forms should be used. Students should be encouraged to complete them correctly and to file them appropriately for accurate record-keeping and for future use by a store's supervisory personnel.

Computers are widely used in a retail environment. To gain experience with them, students might use computers in applications in such areas as inventory, accounts receivable, and the design of display materials in a school store.

Teachers should outline to students the process for assessment at the beginning of the course, including the weighting of each of its components and the cognitive and affective performance objectives to be measured. Wherever possible, students should be involved in both peer and self-evaluation as well as the establishment of the specific criteria used to evaluate performance. Periodic student-teacher conferences can help to increase students' motivation and improve their performance.

Because of the vocational nature of retailing, a strong emphasis should be placed on the assessment of students' affective skills (e.g., work habits; approach to peers, superiors, and the public). Although these skills can be observed, it is advisable to use techniques such as anecdotal reports, checklists, rating scales, and self-evaluation instruments in their assessment. Information resulting from such assessment should be communicated frequently to students in a formative manner, and student improvement should be reinforced.

Teachers should use a variety of methods to assess cognitive skills in this course. Suitable vehicles for assessment might include the following: written and oral presentations, projects, assignments, scrapbooks, unit tests, term tests, and formal examinations.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Introduction to Retailing	20-25
II. Retail Selling	20-25
III. Store Operations	20-40
IV. Advertising and Display	20-25

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items presented in bold face are core content.

I. Introduction to Retailing

Core Content

Students will:

1. identify the range of activities undertaken by retail establishments;

- describe the evolution of Canadian retailing, from the general store of the nineteenth century to contemporary conglomerates;
- chart the various channels of distribution and identify the place of retailing within them;
- describe a variety of promotional activities undertaken by retail stores;

2. classify retail operations;

- distinguish among convenience, general-shopping, and specialty stores;
- list and give examples of types of storefront and non-storefront retailers (e.g., chain stores, single-line stores, department stores, mail-order operations, franchises, supermarkets, discount stores, and co-operatives);
- identify examples of each type of retailer in the local community;

3. describe the Canadian retail market;

- define the methods used to categorize a market (e.g., by sex, age, income, family life cycle, culture);
- describe the characteristics of a market segment for a particular retail store;
- identify current demographic or consumer trends in the Canadian retail market;

4. define *location research* and describe its function;

- list the major factors used by retail establishments to determine location;
- list the major sources of information available to assist in the locating of a retail store (e.g., business publications, local business associations, Chambers of Commerce);

5. list the reasons for retail success or failure;

- identify the advantages and disadvantages of starting one's own business and buying a franchise;
- list some successful retailing operations in their area and determine the reasons for their success;

6. describe the personal and interpersonal skills required for a successful retail career;

- list a wide range of retail positions, both entry-level and management, and the educational requirements for each;
- identify the educational requirements for retailing courses at a local community college;
- identify ways to locate potential retailing employment opportunities;
- collect advertisements for positions in a retail field;
- identify the attitudes and special characteristics of effective retail employees;
- identify the characteristics of effective retail managers;
- outline the importance of understanding and following established store policies and routines;
- complete a personal résumé and a sample job-application form for an actual retail-store position.

Optional Content

Students will:

1. *role-play and possibly videotape mock interviews for a variety of retail employment opportunities;*
2. *select a particular type of retail industry and describe its history, future trends in the industry, and job opportunities and the educational requirements for them;*
3. *participate in MECCA, OBEA, or JA activities or other competitive situations in which opportunities for retailing applications are presented in a case-study format.*

II. Retail Selling



Core Content

Students will:

1. **describe the importance of the customer and the employee in the retail selling process;**
 - identify desirable personality traits for retail selling;
 - describe the attitudes that good retail employees should exhibit towards customers;
 - complete a self-evaluation checklist on their selling abilities;
 - develop personal self-improvement plans;
 - describe the job-entry skills that are required for selling positions;
 - identify some of the attitudes that good managers exhibit towards their employees;
2. **identify and predict the buying motives of a variety of retail customers;**
 - outline the motives that prompt customers to shop at a particular retail store or buy a particular product line;
 - state the stages in the buying decision (i.e., awareness, interest, evaluation, trial, and adoption);
 - identify some of the factors that affect the purchase decision (e.g., time, sex, age, other market characteristics);
 - define AIDA (attention, interest, desire, action) and give examples of its application;
 - analyse various types of customers (e.g., distracted, browsing, argumentative, rushed, talkative) and identify appropriate strategies for handling each;

3. **identify the sources and importance of product information in a retail sale;**

- list the major sources of product information (e.g., labels, consumer magazines, promotional literature, other salespeople);
- list the product and sales features of a selected retail product or service;

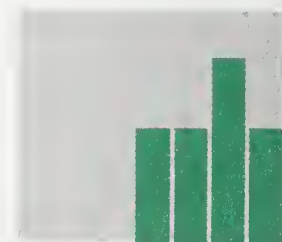
4. **describe and use the stages in the retail-sales presentation;**

- list the stages of the retail-sales process (i.e., opening, handling objections, closing);
- summarize and evaluate effective and ineffective retail-sales presentations, drawn from either actual retail-store operations or case studies;
- role-play a sales presentation or examine a sales-presentation case study;
- identify the different characteristics of the selling process that are required in different kinds of retail operations;

5. **describe the legal conditions that must be met for a sale to become a contract;**

- define the following: agreement, consideration, capacity, consent, legal purpose;
- define *caveat emptor* and its implications for the retailer;
- understand the law as it applies to the return of merchandise and the importance of store policies with respect to this matter.

III. Store Operations



Core Content

Students will:

1. **define the concept of the merchandise or buying plan;**

- assess the importance of maintaining an adequate and balanced inventory;
- assess the importance of obtaining market, product, sales, and consumer information from suppliers;
- prepare a diagram of the stages in the fashion or product life cycle of a product or service;
- trace a product or service through the various stages of the fashion or product life cycle;

2. **understand the principles behind store layout and store design;**

- define the concept of image and identify the contribution that store layout and design make to it;
- examine a variety of store layouts and state the advantages and disadvantages of each;
- design improved store layouts;

3. **operate a point-of-sale terminal;**

- simulate or demonstrate the entry of cash and credit transactions on a cash register;
- demonstrate a procedure to use for voids and merchandise returns;

4. perform simple retail mathematical calculations;

- calculate selling prices, mark-ups, and mark-downs;
- calculate expenses (fixed and variable), rates of turnover, and the cost of goods sold;

5. describe various retail inventory procedures;

- list the importance of inventory procedures;
- prepare receiving reports;
- mark inventory for sale;
- stock goods;
- use various ticket-pricing methods;
- understand the significance of the Universal Product Code (UPC) and computerized pricing;

6. outline the purpose of credit in retailing operations;

- outline the importance of establishing and maintaining a good personal credit rating;
- describe the major factors to be considered when a store grants a customer a store credit;
- outline the information required on a credit application;
- examine simulated credit applications and determine whether the applicant should be granted credit;

7. outline the causes and effects of shoplifting and pilfering;

- describe security techniques used to discourage shoplifting and pilfering;
- recommend ways to improve consumer and employee attitudes towards theft;

8. demonstrate retail knowledge, skills, and attitudes required by employers;

- participate in the operation of a school store;
- participate in a short-term work placement with a local retailer;
- participate in a retailing co-operative education program;
- create and organize an actual promotion/sales campaign within the school or the community (e.g., the sale of yearbooks or the sale of a product or service to raise funds for a school or community organization).

Optional Content

Students will:

1. perform detailed retail, mathematical, computer, financial, or store-procedure operations;

- identify break-even points;
- examine financial statements and identify their use in a retail-store operation;
- outline the inventory requirement for particular retail operations during certain seasons of the year;
- describe current trends in data-processing techniques in retailing;
- use a computerized inventory system;
- identify the procedures used for performing credit checks and ratings on customers;
- adjust selling prices on ticketed items to allow for discounts;
- interview a retail-store accountant or bookkeeper and identify the use and importance of financial statements in a retail-store operation;
- assist in the preparation of a float and in the balancing of cash at the end of the day;

2. simulate the formation of a new retail business;

- analyse the results of marketing research, using a computer program;
- complete a major project involving the setting up of an original retail business, including the following operations: obtaining financing, finding a location, buying goods, planning store layout, and establishing personnel policies;
- participate in JA projects;
- participate in the written competition on entrepreneurship sponsored by MECCA;

3. participate in a school, regional, or provincial marketing club organized by MECCA;

- analyse and prepare a report on a particular area of marketing (e.g., advertising and display, apparel and accessories marketing, finance and credit, food marketing, general merchandising, general marketing, restaurant marketing, service-station retailing);
- form and operate a local MECCA chapter within the school;
- compete in school, regional, or provincial competitions.

IV. Advertising and Display

Core Content

Students will:

1. **differentiate among advertising, publicity, and display;**
2. **list and explain the types of advertising and the advertising objectives of a retail store;**
 - classify advertising according to several categories (e.g., geographical, demand, product, institutional);
 - describe the importance of seasons and holidays to advertising;
3. **define the characteristics of the most common advertising media available to retail operations;**
 - identify the advantages and disadvantages of newspaper, radio, magazine, television, billboard, and mail advertisements;
 - describe why various print media and radio are the most common media used by retail operations;
4. **identify the components of a print advertisement that might appear in a local flyer, newspaper, or magazine;**
 - prepare a layout of a print advertisement that contains a heading, an illustration, copy, and a logo;



5. **identify the importance, purpose, and types of internal and external displays used in a retail store;**

- identify the appropriate locations in a retail store for external and internal displays;
- evaluate a display according to its arrangement, lighting, cleanliness, selling power, timeliness, use of colour, technical features, and ability to attract attention;

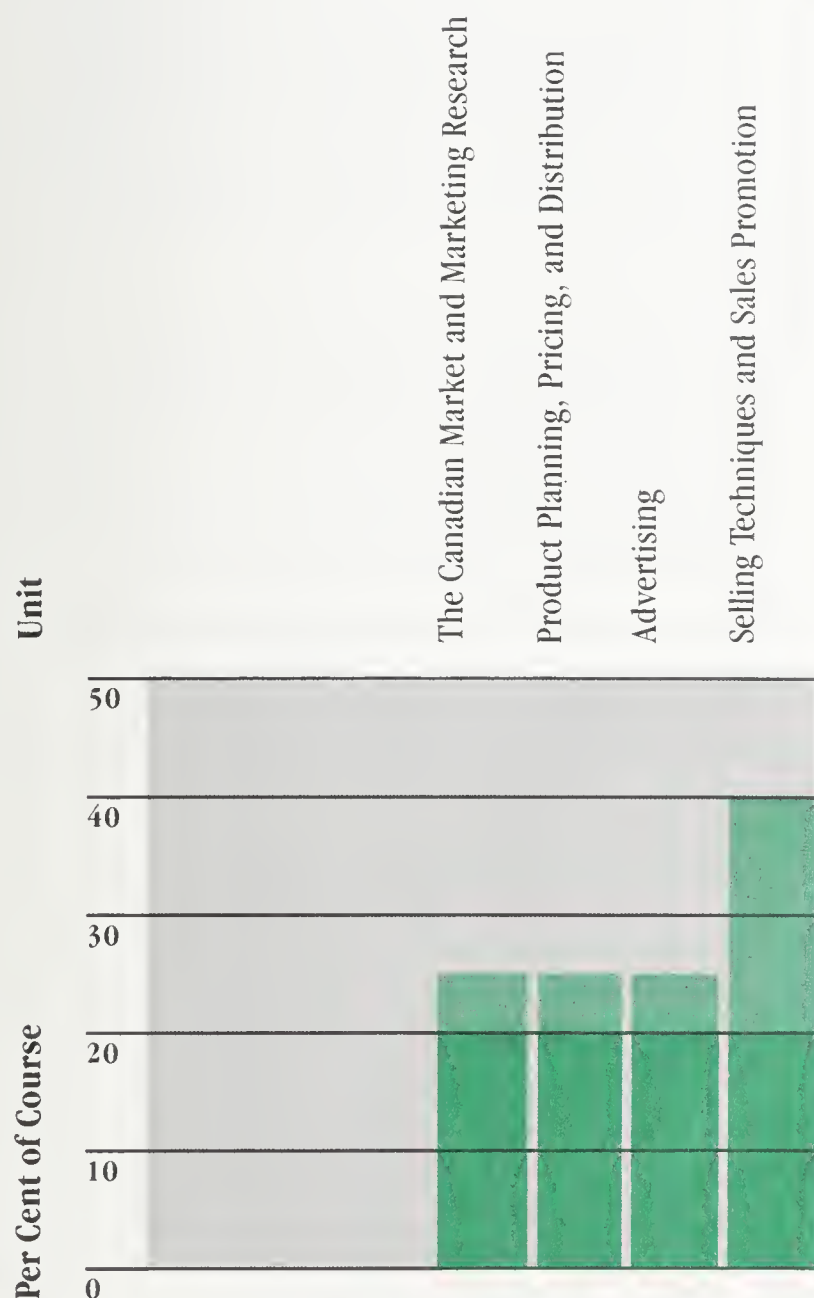
6. **identify the career opportunities available in retail advertising.**

Optional Content

Students will:

1. *apply the principles of display design;*
 - design actual retail-store windows within a school or at a local retail-store location;
 - design a display in which they use a shadow box;
2. *participate in an advertising campaign within the school;*
 - create publicity announcements for school events;
 - illustrate and advertise upcoming school or fund-raising events by means of showcases, posters, and other forms of promotion.

Marketing, General Level (BMK)



Introduction

In this general-level Senior Division course, students will examine marketing activities in Canada and prepare promotional materials for specific products or services. They will have opportunities to identify and practise the skills, knowledge, and attitudes required for successful employment in a marketing field. Students may earn a maximum of one in-school credit for this course, for which there is no prerequisite.

This course should provide students with opportunities to:

- develop an understanding of the terminology and practices used in marketing;
- demonstrate an understanding of the role of marketing in the Canadian economy;
- understand and apply the principles of responsible business ethics;
- practise effective work habits, attitudes, and interpersonal skills in a retailing environment;
- understand the effects of societal and technological change on distribution and marketing practices;
- develop the skills required for effective critical thinking and problem solving through the analysis of marketing cases and problems;
- identify the educational and skill requirements for careers and postsecondary educational programs in marketing;
- demonstrate courtesy, tact, and diplomacy in dealing with, and an appreciation of the values and attitudes of, those from cultural or social backgrounds different from their own;
- identify the personal qualities and characteristics that are required for success in marketing.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this marketing course at the general level and are suggested in addition to the general strategies for teaching and evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

Students should be encouraged to maintain and use a glossary of terms that they have prepared themselves after group work or a class discussion on a topic. Field trips, films, videotapes, role-playing situations, guest speakers from the local business community, and case studies will help students to appreciate the goals of marketing, to understand how marketing principles are applied in the business community, and to identify the skills they will need for success in this field. MECCA and JA have excellent programs that should be used to provide “real” experiences for students.

The importance of effective work habits and attitudes should be continually stressed and reviewed. Students should be encouraged to plan their work assignments so that they can make efficient use of their time and energy. Both the planning and the finished product of such assignments should be evaluated.

Teachers should outline to students the process for assessment at the beginning of the course, including the weighting of each of its components and the cognitive and affective performance objectives to be measured. Wherever possible, students should be involved in both peer and self-evaluation as well as the establishment of the specific criteria used to evaluate performance. Periodic student-teacher conferences can help to increase students’ motivation and improve their performance.

The evaluation process should include the measurement of the full range of students’ cognitive abilities; however, the major emphasis of cognitive-assessment instruments should be on determining students’ knowledge, comprehension, and application of marketing content. Teachers should use a variety of methods to assess cognitive skills, such as written and oral reports, projects, assignments, scrapbooks, unit tests, term tests, and formal examinations.

Because of the vocational nature of all general-level courses, and marketing in particular, an assessment of students’ affective skills, especially those associated with their work habits and their approach to peers, superiors, and the public, should be a component of the assessment process. Although these skills can be observed, it is advisable to use techniques such as anecdotal reports, checklists, rating scales, and self-evaluation instruments in their assessment. Information resulting from such assessment should be communicated to students frequently in a formative manner, and student improvement should be reinforced.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. The Canadian Market and Marketing Research	20–25
II. Product Planning, Pricing, and Distribution	20–25
III. Advertising	20–25
IV. Selling Techniques and Sales Promotion	20–40

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items presented in bold face are core content.

I. The Canadian Market and Marketing Research



Core Content

Students will:

1. **trace the evolution of marketing;**
2. **identify the utilities of marketing;**
 - define the utilities of time, place, form, and possession;
 - identify the utilities created by a variety of marketing activities or retail stores;
3. **identify the basic market segments of the Canadian economy;**
 - describe the consumer, industrial, and government markets and identify the kind of products that are found in each;
 - classify consumer goods;
 - differentiate between products and services;
 - prepare a report outlining a specific consumer market;

4. identify the components of the marketing mix;

- describe the marketing mix in terms of product planning, pricing, promotion, and distribution;
- identify the kind of decisions that have to be made in each of the four elements of the marketing mix;
- describe combinations of the four elements that could be used in marketing a product;
- describe the importance of demography and market segmentation;
- assess current demographic trends;
- assess the demography of market segmentation for a specific consumer market;

5. explain the buying process;

- identify the factors that determine the buying habits and decision making that take place in the consumer market;
- analyse the process involved in deciding to buy or adopt a product;
- describe the dynamics of group buying, including the roles of initiator, decider, and influencer;
- identify the factors involved in making informal, intelligent buying decisions and describe how marketers must handle these factors;

6. explain the concept of marketing research;

- describe the importance of marketing information for the successful operation of a firm;
- identify the types of marketing information that are needed in each of the four elements of the marketing mix;
- list and explain the standard types of marketing research (e.g., consumer-product research, sales analysis, advertising research);
- prepare lists of secondary sources of information that are available in the school library or in the community;
- identify appropriate trade papers and shows;
- apply the concepts of marketing research by designing and conducting surveys, interviewing an appropriate number and sample of consumers, and evaluating the results;

7. identify career opportunities in marketing;

- collect advertisements for marketing-related positions;
- summarize the requirements for these positions in terms of education, skill, and personality traits.

Optional Content

Students will:

1. *identify the marketing successes of Canadian entrepreneurs;*
 - classify industrial goods;
 - distinguish between industrial-marketing and consumer-marketing activities;
 - prepare a list of careers in industrial-marketing fields;
 - select a specific industrial market (e.g., steel, pulp and paper) and prepare a report outlining the marketing activities involved in it;
2. *describe the Canadian industrial market;*
 - classify industrial goods;
 - distinguish between industrial-marketing and consumer-marketing activities;
 - prepare a list of careers in industrial-marketing fields;
 - select a specific industrial market (e.g., steel, pulp and paper) and prepare a report outlining the marketing activities involved in it;
3. *describe the characteristics of the Canadian government market;*
 - identify the marketing activities of all three levels of government in Canada;
 - identify a variety of federal and provincial Crown corporations;
 - identify the kinds of products marketed by government.

II. Product Planning, Pricing, and Distribution



Core Content

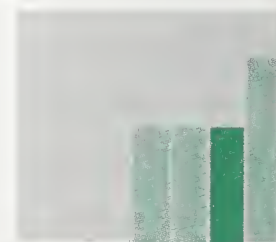
Students will:

1. **outline the importance of the profit motive in the free-enterprise system;**
 - describe the free-enterprise system;
 - describe the objectives of a firm;
 - identify the role of profits in the decision-making process in a firm;
 - explain the relationship between the pricing policy of the marketing mix and the profit motive of a firm;
2. **explain the concept of a pricing policy;**
 - describe several pricing policies (e.g., skimming, dumping, cost-plus, geographical, discriminatory);
 - outline the function of the Combines Investigation Act as it applies to pricing;
 - give examples of the effects of marketing boards on prices;
3. **describe the product life cycle;**
 - name each stage in the product life cycle;
 - explain the marketing strategy that would be used in each stage;
 - place current products in their correct stage;
4. **differentiate between a product and a service;**
 - summarize the products and services available in local shopping centres (e.g., insurance, travel arrangements, hairstyling, hardware);
 - determine the diverse range of services available in the local community by examining the yellow pages in the local telephone directory;
5. **explain the concept of product-brand creation and packaging;**
 - distinguish among brand names, trademarks, and labels;
 - distinguish among national, private, and generic brands;
 - describe the role that protection, utility, information, motivation, and cost play in the creation of a package;
 - design or redesign a product package;
6. **identify the channels of distribution for consumer and industrial goods;**
 - list the types of channels of distribution that are available;
 - describe the role of the channel captain or the distribution manager;
 - describe the factors that determine the selection of a distribution channel;
 - identify the activities performed by wholesalers and intermediaries;
 - distinguish among merchant wholesalers, agents, and brokers;
7. **identify transportation modes, such as rail, air, road, and water;**
8. **identify the issues involved in warehousing and the importance of inventory control.**

Optional Content

Students will:

1. *describe the roles of standards, grading, and labelling;*
 - identify the range of standards, grading, and labelling that exists in the marketplace;
 - identify the standards, grades, or labelling used for such product markets as clothing, food, and pharmaceuticals;
 - explain the significance of the Packaging and Labelling Act, the Hazardous Products Act, and the Textile Labelling Act;
 - describe the role of the Canadian Standards Association;
2. *describe the role played by supply and demand in determining price;*
 - graph a supply-and-demand curve and indicate equilibrium;
 - explain the concept of equilibrium price and the problems created when prices are either above or below equilibrium;
 - illustrate the effect of changes in supply and demand on the market when marketing activity is increased and decreased;
 - use a computer program to graph supply-and-demand schedules.



III. Advertising

Core Content

Students will:

1. **describe the nature and purpose of advertising;**
 - distinguish between advertising and publicity;
 - classify advertising as (a) national or local, (b) product or institutional, and (c) primary or selective;
 - interpret the Canadian Code of Advertising Standards;
 - explain the issue of ethics and honesty in advertising, paying particular attention to misleading advertising and advertising directed towards children;
 - list a firm's objectives for advertising;
2. **identify the characteristics and cost of advertising through major and minor media;**
 - list the advantages and disadvantages of the major media (newspapers, radio, television, magazines);
 - list the advantages and disadvantages of the minor media (e.g., outdoor billboards, transit posters, direct mail);
 - identify the cost of advertising through the major media in the local community;
 - identify career opportunities in advertising;

3. describe the organization and function of advertising agencies;

- explain the role of an advertising agency;
- describe how advertising agencies bill clients;
- identify the types of careers available in advertising agencies;

4. describe the major components of a print advertisement;

- apply the AIDA (attention, interest, desire, action) formula to a print advertisement;
- describe the purpose of illustrations;
- write or rewrite copy for a variety of products or services;
- prepare a print advertisement for a product or service;

5. describe the major components of an electronic advertisement;

- describe the purpose of a storyboard;
- explain the terminology used in radio and television;
- prepare either a radio or a television commercial.

Optional Content

Students will:

1. *describe the evolution of advertising;*
2. *demonstrate an understanding of the use of colour in advertising;*
 - examine the psychological and cultural characteristics of colour;
 - analyse the effectiveness of colour in advertisements;
 - prepare a print advertisement using colour;
3. *explain the different stages of advertising that are used throughout the product or fashion cycle.*

IV. Selling Techniques and Sales Promotion



Core Content

Students will:

1. **identify career areas in non-retail selling;**
 - differentiate among industrial, commercial, and retail selling activities;
 - identify the salary ranges in non-retail selling;
 - collect advertisements for selling positions, noting the educational requirements and personality traits required;
2. **identify the characteristics of successful sales-people;**
 - identify the communication skills required for success;
 - describe the mental, physical, and social attributes of successful marketing people;
 - complete a self-evaluation assessment and develop a plan for self-improvement;
 - demonstrate skill in writing effective sales letters;
 - respond to customer-complaint letters;
 - describe the elements of the successful use of the telephone in a sales environment;

3. describe each stage in the non-retail selling process;

- identify the importance of product knowledge;
- identify the importance of developing selling benefits;
- select a product, list its features, and create a package of customer selling benefits;
- identify the types of customer behaviour (e.g., distracted, talkative, argumentative);
- identify the elements of the selling process: pre-approach, prospecting, sales presentation, handling objections, suggestion selling, and follow-up;
- practise the elements of the sales process;
- prepare a sales presentation;
- list ways to overcome customer objections;
- demonstrate effective closing techniques and follow-up;

4. describe sales-promotion activities;

- distinguish among personal selling, sales promotion, and advertising;
- identify sales-promotion techniques (e.g., use of coupons, contests, in-store displays, point-of-purchase advertising);
- list examples of sales-promotion applications;
- practise sales-promotion techniques in the school store or for a school event;
- prepare a list of current sales-promotion activities;

5. describe the purpose of publicity and public relations;

- collect copies of press releases;
- prepare a press release for a promotion campaign;
- prepare publicity for a school or community event;

6. demonstrate marketing knowledge, skills, and attitudes required by employers;

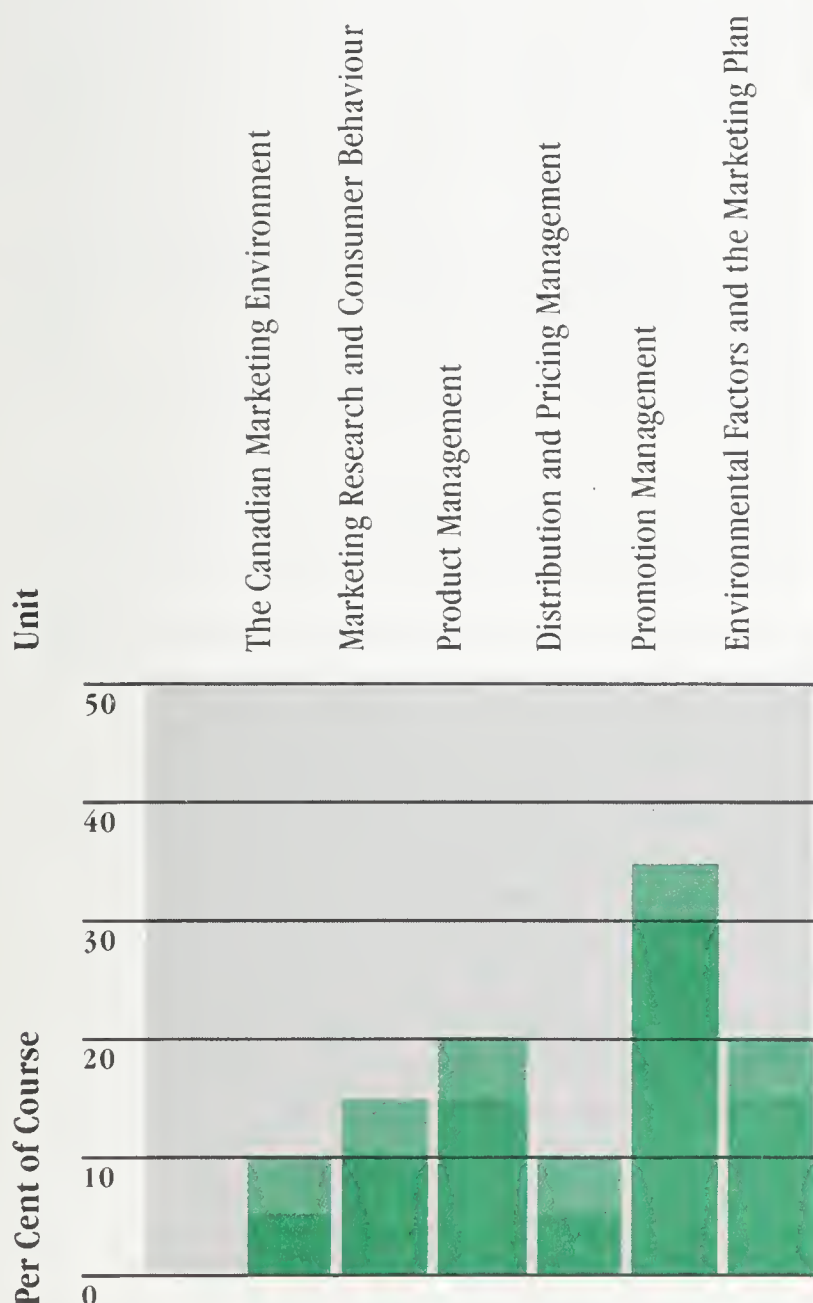
- participate in the operation of a school store;
- participate in a short-term work placement with a local retailer;
- participate in a marketing co-operative education program;
- create and organize an actual promotion/sales campaign within the school or the community (e.g., the sale of yearbooks or the sale of a product or service to raise funds for a school or community organization).

Optional Content

Students will:

- *participate in a school, regional, or provincial marketing club organized by MECCA;*
- analyse and prepare a report on a particular area of marketing (e.g., advertising and display, apparel and accessories marketing, finance and credit, food marketing, general merchandising, general marketing, restaurant marketing, service-station retailing);
- form and operate a local MECCA chapter within the school;
- compete in school, regional, or provincial competitions.

Marketing, Advanced Level (BMK)



Introduction

In this advanced-level Senior Division course, students will examine the elements of marketing in the context of the Canadian marketplace. A marketing management perspective will be emphasized throughout this course, and decision-making and marketing-analysis skills will be developed. Students may earn a maximum of one in-school credit for this course, for which there is no pre-requisite.

This course should provide students with opportunities to:

- develop an understanding of the terminology used and the practices followed in a marketing field;
- understand the wide range of activities involved in marketing;
- understand the effect on marketing practices of social, economic, technological, and educational factors;
- appreciate the skills involved in carrying out effective forecasting and planning activities;
- understand and apply the principles of responsible business ethics;
- identify the educational and skill requirements for careers and postsecondary educational programs in marketing;
- identify the qualities and characteristics required for success in marketing;
- demonstrate an understanding of the values of others from cultural or social backgrounds that are different from their own;
- identify the need for entrepreneurial, management, and effective human-relations skills in marketing;
- apply the concepts of marketing theory in the creation of a marketing plan for a particular product or service.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this marketing course at the advanced level and are suggested in addition to the general strategies for teaching and evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

This course centres around the marketing mix from a management perspective. Students should be expected to be able to put all of the elements of the marketing mix together to create a marketing plan for a particular product or service.

Students should be encouraged to maintain and use a glossary of terms that they have prepared themselves after group work or a class discussion on a topic. Field trips, films, videotapes, role-playing situations, case studies, and guest speakers from the local business community will help students to appreciate the goals of marketing, to understand how marketing principles are applied in the business community, and to identify the skills they will need for success in this field. MECCA, OBEA, and JA provide excellent programs and competitions that should also be used to provide “real” experiences for students.

Effective work habits and attitudes should be continually stressed and reviewed. Students should be encouraged to plan their work assignments so that they can make efficient use of their time and energy. Both the planning and the finished product of such assignments should be evaluated.

Teachers should outline to students the process for assessment at the beginning of the course, including the weighting of each of its components and the cognitive and affective performance objectives to be measured. Wherever possible, students should be involved in both peer and self-evaluation as well as the establishment of the specific criteria used to evaluate performance. Periodic student-teacher conferences can help to increase students’ motivation and improve their performance.

Cognitive evaluation in this advanced-level course in marketing should be directed towards determining the degree of student understanding of particular marketing principles and substantive content. Teachers should use a variety of methods to evaluate advanced-level cognitive skills. Suitable methods might include essays, oral and written reports, projects, unit tests, term tests, and formal examinations.

The demonstration of affective skills should also be part of a student's total assessment. Methods for evaluating affective skills are described in the "Teaching and Assessment Strategies" sections of the general-level retailing and marketing courses.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. The Canadian Marketing Environment	5-10
II. Marketing Research and Consumer Behaviour	10-15
III. Product Management	15-20
IV. Distribution and Pricing Management	5-10
V. Promotion Management	30-35
VI. Environmental Factors and the Marketing Plan	15-20

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items in bold face are core content.

I. The Canadian Marketing Environment



Core Content

Students will:

- trace the evolution of the marketing concept;**
- identify the function of marketing in the Canadian economic system;**
 - describe the marketing concept that marketing activities should be consumer- rather than product-oriented;
 - explain the importance of the consumer in marketing;
 - describe the utilities of time, place, form, and possession created by marketing;
 - identify the utilities created by a variety of marketing activities;
- explain the components of the marketing mix;**
 - describe the marketing mix in terms of product planning, pricing, promotion, and distribution;
 - identify the kinds of decisions that have to be made in each of the four elements of the marketing mix;
 - describe combinations of the four elements that could be used to market a product;
 - describe the consumer, industrial, and government markets;

4. **identify the environmental factors that influence the marketing mix;**

- outline the effect of the political, social, cultural, and legal environments on the selection of a marketing mix;
- describe the effect of technology, the economy, and competition on the marketing mix;
- list examples of how the above have changed the marketing mix of a particular product (e.g., cigarettes);

5. **describe the organization and function of a marketing department;**

- relate the functions of a marketing department to the marketing mix;
- examine career opportunities in a marketing department;
- summarize the requirements for these positions in terms of education, skills, and personality traits;
- identify the principles behind the operation of a marketing department and identify their specific objectives;
- understand the importance of good management.

Optional Content

Students will:

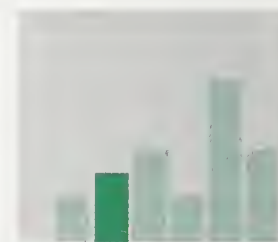
1. *describe the importance of international marketing to the Canadian market;*

- explain the significance of balance-of-trade statistics, exchange rates, trade barriers, and quotas;
- describe state marketing corporations and the marketing mix in other countries;
- describe the role that government agencies play in increasing Canada's share in the international market;
- identify some of Canada's major trading partners;

2. *identify current problems related to marketing;*

- assess the effects on marketing of planned obsolescence, ecological concerns, social and moral issues in advertising, consumer issues, the role of women in the media, issues related to advertising directed towards children, and the use of and the effect of such demographic changes as the aging of the baby-boom population, higher divorce rates, and declining family size;
- examine in detail the effect of a demographic change.

II. Marketing Research and Consumer Behaviour



Core Content

Students will:

1. **identify the concept and the importance of marketing research for effective decision making;**

- describe the importance of information gathering to success in determining the appropriate marketing mix and solving marketing problems;
- identify the major steps involved in solving marketing problems (i.e., assessing the situation, defining the problem, conducting informal and formal marketing research, evaluating potential solutions or directions, planning marketing directions, and putting the plan into action);
- practise defining problems through the use of the case-study method;
- identify the major sources used in situation analysis (i.e., primary and secondary data);
- list the major sources of secondary data (i.e., government, private sources, trade papers, trade associations, and the local Chamber of Commerce);
- identify a variety of marketing-research methods used to gather primary data (e.g., experiments, surveys, observation);
- identify the importance of developing a hypothesis in the informal-research stage;
- conduct an informal survey of student attitudes towards a product and present the data collected in the form of a table or a graph;

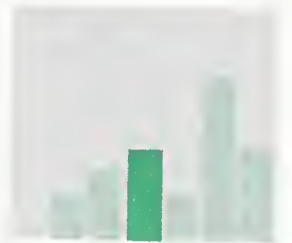
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- assess one method of formal research (e.g., observations, surveys, experiments);
 - evaluate completed marketing-research projects (e.g., product research, motivation research, advertising research, sales research);
- 2. describe the demographics and segmentation of the Canadian consumer market;**
- describe major demographic factors (e.g., age, sex, income, geography, urban-rural composition, family life cycle, ethnic background);
 - predict demographic changes in the future and list the effects that they may have on the marketing mix;
- 3. identify consumer behaviour patterns;**
- interpret motivation and learning theories (e.g., Maslow's hierarchy of needs and wants, lifestyle analysis);
 - explain the adoption process (i.e., awareness, interest, evaluation, trial, and adoption);
 - describe why, how, when, and where consumers will buy particular products;
 - identify the dynamics of group buying (i.e., the roles of initiator, decider, and influencer);
- 4. describe motivation research;**
- explain the importance of motivation research in determining consumer buying motives;
 - identify some of the techniques used in motivation research (e.g., focus groups, surveys, depth interviews, experiments);
 - conduct a small motivation-research project on a product and present their findings in a report.

III. Product Management

Core Content

Students will:

- 1. explain the concept of the product life cycle;**
 - define the characteristics of each stage as they apply to the marketing mix;
 - give examples of how marketing strategies can reposition products on the life cycle;
- 2. classify consumer and industrial goods;**
 - differentiate between products and services;
 - describe the classification system of consumer goods (e.g., speciality shopping, convenience goods);
 - describe the classification system of industrial goods (e.g., major installation, component, raw materials);
 - categorize a variety of products according to the above classification systems;
 - identify how the marketing mix is affected by the classification of goods;



3. describe the concept of product-brand creation and packaging;

- identify the importance of achieving brand recognition;
- identify the role that the creation of brands plays in market segmentation;
- explain the function of brands;
- differentiate among brands, labels, and trademarks;
- describe national, private, and generic brands;
- identify the qualities of a good brand name;
- create brand names that feature the qualities of successful existing brand names;
- identify the information that is required by law on a product label;
- outline the nature and functions of various forms of packaging;
- critique packages in terms of protection, utility, motivation, information, and cost;

4. describe the steps involved in the process of new-product development;

- describe the role of a product manager;
- identify the steps involved in creating, screening, and testing new products;
- apply the steps of product development to a practical project in which they develop new products or services.

Optional Content

Students will:

1. *describe the evolution of packaging and predict its future directions;*

- identify the design and use of ancient containers;
- describe current practices in packaging;
- predict future styles and characteristics of packaging;

2. *differentiate between service and product management;*

- explain the importance of services in the Canadian market and economy;
- list the services found in the consumer, industrial, and government market segments;
- describe how the marketing effort required for services differs from that for products;
- explain the increasing importance of services in the economy.

IV. Distribution and Pricing Management



Core Content

Students will:

1. **explain how supply and demand are used to determine price;**

- identify equilibrium price and quantity on a supply-and-demand graph;
- understand the problems of shortage and surplus that are created when a market price is not at equilibrium;
- list the kinds of factors that can cause supply or demand to change and predict the effect of those changes on price;
- identify the relationship between a pricing policy and the concept of market equilibrium;
- describe the role of inventories in a firm's pricing policy;
- describe various pricing policies (e.g., skimming, dumping, pricing below and above competitors);
- explain the pricing strategies that could be used to market slow-moving items;
- explain the concept of the demand curve and explain how it can be segmented according to the price that various market segments are willing to pay;
- give examples of such price segmentation (e.g., that practised by airlines);

2. identify the channels of distribution for consumer and industrial goods;

- list the types of channels of distribution that are available;
- describe the role of the channel captain or the distribution manager;
- describe the factors that determine the selection of a distribution channel;
- identify the activities performed by wholesalers and intermediaries;
- distinguish among merchant wholesalers, agents, and brokers.

Optional Content

Students will:

1. *identify transportation modes such as rail, air, road, and water;*
2. *identify the issues involved in warehousing and the importance of inventory control;*
3. *examine the financial aspects of marketing;*
 - describe the concept of budgeting;
 - examine financial statements and identify the effect that marketing might have on the budget.

V. Promotion Management



Core Content

Students will:

1. describe the elements of the promotion mix;

- describe the application of advertising, personal selling, sales promotion, and public relations in the promotion mix;
- identify the objectives of promotion;
- describe the advantages and disadvantages of each element of the promotion mix;
- determine the most appropriate promotion mix for a variety of products (e.g., a high degree of advertising for national products and of personal selling for high-value items);

2. describe the advertising element of the marketing mix;

- explain the main objectives of advertising;
- outline the advantages and disadvantages of the major and minor advertising media (i.e., print, the electronic media, outdoor billboards, transit posters, and direct mail);
- list the characteristics of a major medium;
- assess a print advertisement that contains a layout design, a heading, illustrations, copy, and a logo;
- assess a script and story or theme board for a radio or television commercial;
- outline some of the techniques used to measure the effectiveness of advertising;

- describe the functions of the Canadian Radio-Television and Telecommunications Commission and the Canadian Advertising Advisory Board;
 - describe the organization and functions of an advertising agency;
 - identify career opportunities in advertising (e.g., as account executive, media buyer);
- 3. examine the selling process;**
- differentiate between consumer and industrial selling;
 - identify the importance of effective communication skills;
 - identify the importance of image and “selling oneself”;
 - list the kinds of training programs for sales personnel that are offered in business;
 - identify the importance of product knowledge;
 - describe the importance of developing selling benefits;
 - select a product, list its product features, and create customer selling benefits;
 - identify the elements of the selling process: pre-approach, prospecting, sales presentation, handling objections, suggestion selling, and follow-up;
 - prepare and demonstrate a sales presentation;
- 4. describe sales-promotion activities;**
- list sales-promotion techniques (e.g., use of coupons, contests, in-store displays, point-of-purchase advertising);
 - give examples of sales-promotion methods used by successful marketers;
 - explain the relationship between advertising and personal selling;
- 5. co-ordinate a promotional plan or research an existing plan for a product or service;**
- determine the objectives of the promotion;
 - justify the promotional mix for the promotion;
 - develop the stages of the promotion.

Optional Content

Students will:

- 1. describe the early history of advertising;*
- 2. evaluate the use of colour in print advertising;*
 - describe the effective use of colour in professional advertisements;
 - identify the psychological effects of colour;
 - use colour in the preparation of print advertisements;
- 3. assess and demonstrate the use of effective techniques in the preparation of electronic advertising;*
 - prepare a storyboard and/or a script for a thirty- or sixty-second TV or radio commercial;
- 4. form a management team and simulate the decisions required in producing or marketing a new product;*
 - participate in JA activities;
- 5. assess a particular area of marketing (e.g., advertising and display, apparel and accessories marketing, finance and credit, food marketing, general merchandising, general marketing, restaurant marketing, service-station retailing);*
 - form and operate a marketing club within the school;
 - participate in school, regional, or provincial competitions.

VI. Environmental Factors and the Marketing Plan



Core Content

Students will:

1. define the concept of an economic system;

- describe the Canadian economic system;
- identify the role that profit plays in economic decision making;
- describe the concept of the business cycle and identify the effect that inflation and recession have on the marketing mix;
- describe the role that government plays in stabilizing the economy and identify its effect on a firm's decision making;

2. describe different forms of competition;

- differentiate between competitive and monopolistic industries;
- outline the nature of an oligopoly and identify the importance of product differentiation;
- identify the government regulations that might affect marketing practices (e.g., the Combines Investigation Act, the Labelling Act) and misleading advertising;

3. describe major legislation that regulates marketing activities in Canada;

- identify the importance of government regulation;
- describe the legislation that affects patents, trademarks, and copyrights;
- identify examples of misleading advertising;
- describe the legislation that affects packaging;
- identify labelling and standards legislation;
- describe the effect of pressure groups on marketing decisions;

4. create a marketing plan;

- describe the steps in creating a marketing plan (i.e., establishing objectives, establishing a marketing strategy, and conducting a situation analysis);
- establish the marketing objectives and marketing strategies for a particular product;
- determine the environmental factors that might affect a product;
- relate the concept of segmentation and positioning to a situation analysis;
- apply these concepts to a case study;
- prepare a marketing plan for a product.

Optional Content

Students will:

1. create a financial plan for an existing or new business;

- identify a variety of sources of financing;

2. develop a marketing mix for the business;

- identify the costs of each element of the marketing mix.

2. Stockkeeping and Warehousing

Introduction

Program Description

The stockkeeping and warehousing program will provide students with an opportunity to identify and practise the skills required for job entry into a stockkeeping or warehousing business environment. It will enable them to develop and apply those attitudes and habits required for successful employment in this field and to practise working effectively with others on small-group assignments.

As illustrated in the diagram on page 65, this part of the business studies guideline authorizes four courses in stockkeeping and warehousing. Students may earn one credit in each of the first two courses and two credits in each of the last two courses for a maximum of six in-school credits at the basic level of difficulty. Additional credits in this program may be earned through a co-operative education mode of delivery as authorized in section 5.11 of OSIS.

	Intermediate Division		Senior Division	
Basic Level	Stockkeeping and Warehousing (BMS1B) (1 credit)	Stockkeeping and Warehousing (BMS2B) (1 credit)	Stockkeeping and Warehousing (BMS3B) (2 credits)	Stockkeeping and Warehousing (BMS4B) (2 credits)

Aims

The aims of all stockkeeping and warehousing courses are to provide students with opportunities to:

- develop an understanding of the systems and procedures used in a stockkeeping and warehousing environment;
- practise the manual completing and handling of the forms required for efficient material handling;
- examine the application of a computerized warehousing system and practise the routines involved;
- identify and demonstrate an appreciation for a safe work environment, including the procedures for the safe operation of the equipment used in material handling, storing, and shipping, and inventory control;
- understand and correctly use stockkeeping and warehousing terminology;
- practise effective communication and interpersonal skills;
- demonstrate an appreciation of effective work habits and attitudes such as honesty, responsibility, and respect for and tolerance of fellow workers;
- develop an understanding of employers and of their responsibilities regarding a safe working environment.

Teaching Strategies

In addition to the general teaching strategies included in the business studies policy document *Policy for Program Planning and Delivery*, teaching strategies for stockkeeping and warehousing courses are included in this section and in the description of the specific stockkeeping and warehousing courses that follow.

Stockkeeping and warehousing courses should be designed to provide opportunities for students to practise the skills required for job entry into this field. Theory presentations should be brief, interspersed with concrete applications, repeated frequently for reinforcement and review, and accompanied by opportunities for students to evaluate their understanding of each component. Activities should be designed as small packages or units of work assignments by means of which students can learn to work with others and accept responsibility for their contributions to the completion of all tasks assigned.

In order to help students acquire and use vocabulary specific to a stockkeeping and warehousing work environment, teachers should encourage them to prepare and use a glossary of terms that they have developed on their own following class discussions on particular aspects of each course.

Rules for health and safety on the job should be visible in the classroom, reviewed on a regular basis, and applied to on-the-job assignments throughout the program.

Field trips, films, videotapes, and guest speakers should be considered important components of all stockkeeping and warehousing courses. Students need to observe, experience, and understand the different operating procedures in a variety of material-handling environments. They should be required to detail step-by-step procedures for each component of the work they observe and apply these procedures to in-class learning activities.

The keeping of records is an important component in a stockkeeping environment. Students should be required to complete, maintain, and store business forms connected to their in-class assignments. They should also be required to keep accurate and detailed records of classroom learning materials and application procedures. The use of a computer program for maintaining accurate records of inventory on hand is particularly appropriate for students in this course.

Project assignments should be short, clearly defined, and supported by frequent opportunities for student-teacher conferences to ensure that students are on topic and that their projects are developing appropriately.

Work experience in the community or co-operative education work assignments should help students appreciate what is expected of employees in this field. Such experiences should also help them overcome any uneasiness or insecurity that they might feel about applying for work or working with others outside of the school environment. Students should be encouraged to share their work-experience learnings with their classmates on their return to the classroom.

Evaluation of Student Achievement

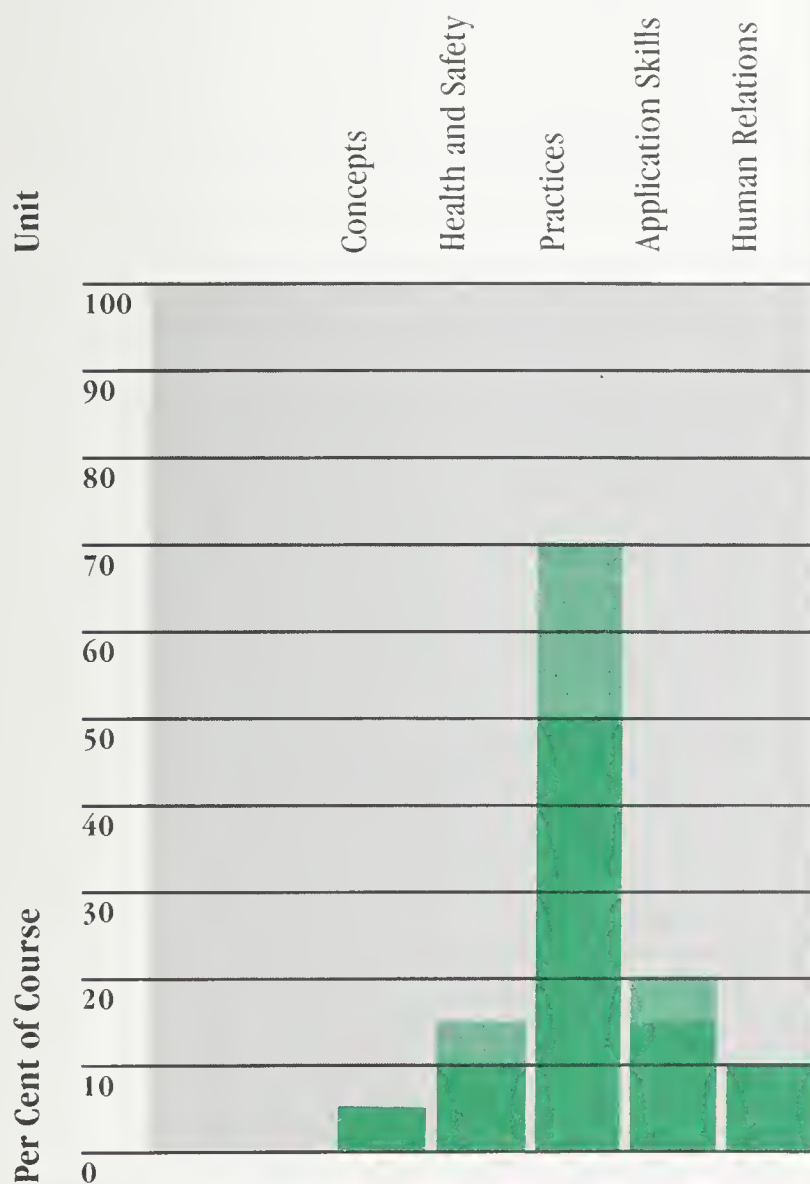
General suggestions for the evaluation of student achievement may be found in the business studies policy document *Policy for Program Planning and Delivery*. The following recommendations relate to all stockkeeping and warehousing courses. Additional suggestions for assessment are included in the "Teaching and Assessment Strategies" section for each stockkeeping and warehousing course.

Students should be aware of how their achievement will be assessed on each component of each course and should have an opportunity to participate to some extent in determining the criteria for their performance assessment. Peer and self-evaluation should be employed throughout the program, with a decreasing amount of teacher direction, supervision, and encouragement as the program proceeds. All evaluation in stockkeeping and warehousing courses should focus on students' performance, as opposed to their knowledge of individual subject components, and on the amount of growth and on-the-job maturity that they exhibit.

Job-performance rating sheets should be used frequently to assess student performance on individual job assignments. These ratings should then be used in teacher-student consultations designed to determine student progress and development in the program.

Tests should be short and directed towards specific learning objectives. No single project, test, or examination should form a large part of a student's total evaluation. Because stockkeeping and warehousing programs are designed to be practical and activity-oriented, a large part of students' evaluation should be based on their performance of assigned tasks.

Stockkeeping and Warehousing, Basic Level (BMS1B)



Introduction

This basic-level Intermediate Division course will introduce students to the skills required for a variety of job-entry occupations in the field of stockkeeping and warehousing. It will provide opportunities for them to develop and practise effective work habits and attitudes for success on the job. Students may earn a maximum of one in-school credit in this course, for which there are no prerequisites.

Students should be provided with opportunities to:

- identify the importance and the place of stockkeeping and warehousing in business and industry;
- practise using correct terminology related to the handling of materials in a business environment;
- identify and apply safe working procedures;
- practise effective communication and human-relations skills;
- practise appropriate number and clerical skills.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this stockkeeping and warehousing course at the basic level and are suggested in addition to the general strategies for teaching and for evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

All activities and student-assessment procedures should be carefully designed to encourage students to develop their self-confidence and sense of self-worth. Teachers should be patient with student behaviour and make an effort to support all indications of growth or development.

It is suggested that concrete materials such as blocks, empty boxes, or other objects that resemble those employed in a stockkeeping and warehousing environment be used to demonstrate stacking patterns and allow students an opportunity to practise routine stacking procedures.

The forms used to report damage, requisition material, and show the flow of goods from loading to storage and out to shipping should resemble as closely as possible those used in business. Students should be required to practise completing each form and should use peer and self-evaluation to assess their accuracy and neatness in this aspect of the program.

Continuous assessment should provide both an indication of student problems or weaknesses and the positive reinforcement needed to promote continued student development. Students should be evaluated daily on their attendance, punctuality, co-operation and group effort, ability to assume responsibility for the completeness of their work assignments, and effort to maintain a neat and well-organized work area.

Tests should be short and assigned well in advance. In-class review and practice should normally prepare students for any test assigned, and they should be encouraged to evaluate their performance to determine their abilities and weaknesses.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Concepts	5
II. Health and Safety	10-15
III. Practices	50-70
IV. Application Skills	15-20
V. Human Relations	10

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items in bold face are core content.

I. Concepts

Core Content

Students will:

- 1. describe the role of stockkeeping and warehousing in a business operation;**
 - prepare a flow chart for a stockkeeping and warehousing routine;
 - list the various types of materials stored or handled at different stages of production, storage, and distribution;
- 2. classify a variety of job opportunities available in stockkeeping and warehousing;**
 - using the flow chart of a stockkeeping and warehousing routine developed earlier, identify the occupations involved at each point of the activity;
- 3. describe the basic requirements for entry into this field;**
 - identify the educational courses required for an entry-level job;
 - list the skills, knowledge, and attitudes required for employment in this field.

II. Health and Safety

Core Content

Students will:

- 1. outline a variety of problems that could result from a poorly operated warehouse;**
 - identify the potential hazards in a poorly organized home or classroom;
 - chart instances of poorly organized warehouse activities and the potential safety and health risks arising from them;
 - identify potential health hazards in a warehouse that contains excessive levels of dust in the air and unclean or untidy areas;
- 2. interpret individual Canadian Standards Association (CSA) symbols used to identify toxic, explosive, and corrosive substances;**
 - identify hazardous products found in the home;
 - using the labels found on most household products, identify those products that could be considered hazardous;
 - identify the hazardous materials that might be found in a warehouse;
- 3. demonstrate the mechanics of safe lifting, carrying, and placing of loads;**
 - prepare safety posters that illustrate acceptable and unacceptable methods of lifting and carrying loads;

-
4. **demonstrate the four major stock-stacking patterns (i.e., block, row, brick, and pinwheel);**
 5. **list the kinds of accidents that might occur in a warehouse environment;**
 - identify acceptable methods for handling emergency situations involving injuries;
 - practise common first-aid techniques on themselves and their fellow students;
 6. **outline the procedures involved in compensating injured employees;**
 - visit with a representative of the Workers' Compensation Board to discuss various issues that might affect the amount of compensation that an injured worker would receive.



III. Practices

Core Content

Students will:

1. **gather, pack, close, secure, wrap, tape, label, and weigh a variety of items that require decisions on packing material, filler, wrapping, securing, and shipping;**
 - describe the skills required for the safe gathering, packing, closing, securing, wrapping, taping, labelling, and weighing of a variety of items;
 - relate the use of specific packaging and boxing procedures to a decrease in damage and loss of product;
 - outline how proper packing and boxing can decrease shipping costs and improve a company's image;
2. **identify the skills required to complete an accurate package count and an external examination of stock;**
 - using purchase orders, list the products shipped and take an actual package count of a variety of household and classroom items by means of an external examination;

3. **complete a damage, an overage, and a shortage report;**

- list the differences among these three types of reports;
- identify the various sections of these reports and explain each of their purposes;

4. **prepare a diagram that illustrates the flow of goods from the time they are received to the time they leave a warehouse environment;**

5. **prepare a flow chart that illustrates the flow of goods in a stockroom from the time of a customer request to the time that the customer accepts delivery of the merchandise;**

- explain the use of requisitions and stockroom-layout charts, and the location of bins.

IV. Application Skills

Core Content

Students will:

1. **identify the importance of using neat and legible handwriting or accurate keying of information when completing business forms;**

- list potential problems created by poorly written stock requisitions or purchase orders;
- use neat, legible handwriting to complete stock requisitions, invoices, interoffice memoranda, and receiving reports;

2. **code and file a variety of forms found in a stockkeeping and warehousing environment;**

- file forms numerically, beginning with single-digit numbers and progressing to two- and three-digit numbers;

3. **use a calculator to extend amounts on purchase orders and receiving documents by adding, subtracting, multiplying, and dividing.**

V. Human Relations

Core Content

Students will:

1. **identify the meaning of human relations in a stockkeeping and warehousing environment;**
 - outline how effective interpersonal relations among employees in a company can affect the company's profit picture;
2. **prepare a personal inventory listing their strengths and weaknesses;**
 - identify those qualities that might be considered strengths and those that might be considered weaknesses;
3. **plan ways to improve their strengths and overcome their particular weaknesses;**
 - put their plans into action and set regular opportunities for progress evaluation by both themselves and the teacher;
4. **identify ways to improve their individual acceptance by co-workers or other members of the class;**
 - outline ways to show tolerance;
 - outline ways to show team spirit or group effort;
 - outline ways in which they can be supportive and positive co-workers;
5. **list the important components of effective communication;**
 - identify the importance of feedback;

6. **identify a variety of barriers to effective communication;**

- list such barriers as word connotation, difficulty in distinguishing fact from fiction, and passive listening;
- role-play communication situations or use appropriate case studies or group activities to determine ways to overcome a variety of barriers to effective communication and productive interpersonal relationships.



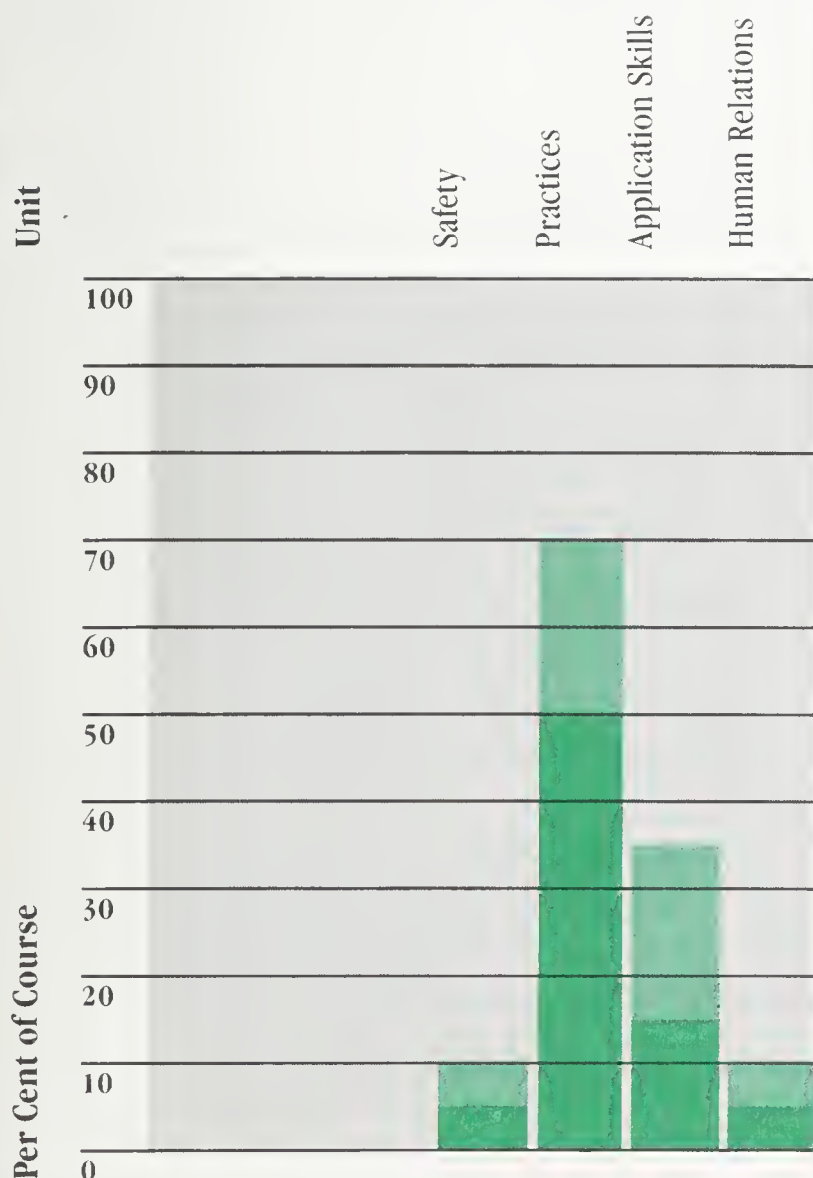
Stockkeeping and Warehousing, Basic Level (BMS2B)

Introduction

This basic-level Intermediate Division course will identify the special skills and understandings necessary for success in the field of stockkeeping and warehousing. Students will practise the skills and abilities required and apply effective work habits and attitudes in stockkeeping and warehousing activities. Students may earn a maximum of one in-school credit in this course, for which there are no prerequisites.

Students should be provided with opportunities to:

- identify the importance and the place of stockkeeping and warehousing in business and industry;
- identify and apply procedures designed to promote health and safety in the school and on the job;
- use stockkeeping terminology correctly;
- develop number and clerical skills that are appropriate for work in this field;
- develop and apply effective communication and interpersonal skills;
- develop a tolerance of others in group situations and a sense of responsibility for and commitment to individual and group assignments.



Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this stockkeeping and warehousing course at the basic level and are suggested in addition to the general strategies for teaching and for evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

All activities and student-assessment procedures should be carefully designed to identify students' strengths and help them develop their abilities. Teachers should use strategies that promote in students an enhanced sense of self-confidence and self-worth. Students should be involved in a process that identifies their individual weaknesses and, with the teacher, should lay out a plan for improvement.

Field trips, films, and videotapes should be used to identify and reinforce the importance of health and safety procedures on the job. Speakers from industry, accident-prevention associations, and first-aid programs will further assist students both to realize the importance of following safety procedures and to identify basic first-aid routines in the event of an accident on the job.

Job-simulation activities should form a major part of this course, and the time spent in performing these routines should be reflected in the overall weighting of student assessment. The use of computer-software programs that simulate a warehousing environment or that manage and control inventory is particularly appropriate in this program.

The use of blocks, drums, empty boxes, bins, or other objects that resemble those employed in a stockkeeping and warehousing environment is recommended for on-the-job simulations. Students should be required to use businesslike forms for all in-class activities. They should be instructed on how to complete, handle, transmit, and file each form correctly. Neat and accurate printing, writing, and extension of amounts should be stressed.

Teacher- or student-designed personal on-the-job rating sheets should be used on a regular basis to help students identify and use their strengths as well as identify and work on overcoming specific weaknesses. The sheets should then be filed for future student reference.

Tests should be short and assigned well in advance. Students should be provided with opportunities for review and practice.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Safety	5-10
II. Practices	50-70
III. Application Skills	15-35
IV. Human Relations	5-10

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items outlined in bold face are core content.



I. Safety

Core Content

Students will:

1. **demonstrate safe procedures for lifting, carrying, placing, and storing different types of merchandise;**
 - outline basic first-aid routines;
2. **discuss the importance of safety with respect to personal clothing in a stockkeeping and warehousing environment;**
 - create a chart of the essential items of clothing from a health and safety viewpoint (e.g., leather gloves, hard hats, safety shoes);
 - identify the danger presented by inappropriate clothing;
 - list protective-clothing requirements for particular warehousing situations;
 - identify clothing related to cultural or religious traditions that could pose a safety hazard and discuss reasonable alternatives or precautions;
3. **identify the attitudes required for a safe warehouse environment;**
 - list the types of accidents that might result from irresponsible or unthinking behaviour;
 - describe how one person's carelessness can result in the injury of another;
4. **identify correct accident-handling procedures;**
 - identify common types of on-the-job injuries;
 - list the procedures to follow when there has been an accident;
 - review this list with an authority on emergency first aid;
5. **list important warehouse procedures for fire safety, prevention, and control;**
 - identify a variety of problem areas and list safe handling procedures (i.e., safe storage of flammable materials; the maintenance of clean and open aisles; the establishment of fire routes, fire-extinguisher and blanket locations, and fire-drill procedures);
 - identify fire-prevention routines;
 - identify the school procedures established for fire prevention, safety, and control.

II. Practices

Core Content

Students will:

1. identify the routines involved in completing a customer's order for shipping;

- explain the meaning of *package count*, *description check*, and *spot check*;
- demonstrate the procedures involved in a package count, description check, and spot check;

2. identify and apply correct receiving procedures;

- explain the meaning of *blind check*, *direct check*, and *spot check*;
- demonstrate the procedures involved in making a blind check, direct check, and spot check;

3. identify the proper procedures for reporting stock shortages, damaged stock, and stock overages;

- explain the meaning of *stock shortages*, *damaged stock*, and *stock overages*;
- describe the effect of damaged goods on a company's profit margin;
- outline the role of fairness, honesty, effective communication, and patience in preventing and dealing with stock shortages, damaged stock, and stock overages;

4. pack a variety of containers and label them for shipping;

- identify the variety of containers used for shipping;
- describe the materials used to wrap and pack goods for shipping purposes;
- practise neat and legible handwriting on shipping forms and labels;

5. identify the kind of special-care labels in use today;

- explain the meaning of the special vocabulary on each special-care label;
- using a variety of case studies, determine the appropriate handling instructions for fragile and perishable merchandise;

6. correctly complete packing slips and invoices in legible handwriting;

- chart the movement of these forms;
- complete price extensions on invoices, using a hand calculator or an electronic calculator;
- referring to a price-source catalogue, determine the correct prices for items ordered;

7. outline the purposes of bins, rota bins, racks, modular-shelving bays, and line storage;

- describe bins, rota bins, racks, modular-shelving bays, and line storage;
- identify sizes, kinds, and rates of turnover of material that would require particular kinds of storage containers;
- construct a cardboard warehouse model, indicating aisles, bin locations, racks, bays, and traffic flow to specific areas from the shipping dock;

8. considering the height, width, and rate of turnover of particular products, describe three main storage-bin set-up factors that should be considered;

9. outline the importance of maintaining an efficient warehouse;

- diagram efficient traffic flows to minimize handling time and energy on fast-moving items in storage;



10. identify various pest-control procedures for a warehouse;

- identify the need to control a variety of pests;
- describe how pest control can contribute to increased profits;

11. outline methods for the safe removal of damaged goods;

- explain the meaning of the terms *toxic*, *explosive*, and *corrosive*;
- determine the effect of leaving damaged stock with other stock in the warehouse.

III. Application Skills



Core Content

Students will:

- 1. demonstrate neat and legible handwriting when completing stockkeeping and warehousing written assignments;**
 - identify problems that might result from poorly written forms;
 - list the various forms used in a stockkeeping and warehousing environment (i.e., interoffice memoranda, stock requisitions, invoices, packing slips, and receiving reports);
 - in neat and legible handwriting, accurately complete copies of each form used in a stockkeeping and warehousing environment;
- 2. practise composing and revising short interoffice memoranda manually and with text-editing equipment;**
- 3. file forms numerically, beginning with simple three-digit numbers and progressing to more complex multidigit numbers, such as those used in bin-number codings;**
 - identify appropriate numeric-filing procedures;
- 4. mentally add, subtract, multiply, and divide numbers related to stockkeeping and warehousing applications;**
 - develop speed and accuracy in using a calculator to add, subtract, multiply, and divide numbers related to stockkeeping and warehousing applications;

5. convert imperial to metric measurements and vice versa;

- identify the reasons for changing from imperial to metric units;
- using a conversion chart or calculator, convert specific measurements from imperial to metric units and from metric to imperial units;

6. describe the use of computerized systems in stockkeeping and warehousing;

- label the important parts of a computer on a diagram;
- describe the meaning of the words *sort*, *tabulate*, *classify*, *file*, and *retrieve* as they apply to computer software;
- load and run a simple inventory program.

IV. Human Relations

Core Content

Students will:

- 1. explain the significance of effective human relations to job satisfaction;**
 - list the various factors involved in effective human relations on the job;
- 2. list employer expectations in a stockkeeping and warehousing environment;**
 - interview local business representatives to determine important attitudes and work habits for success on the job;
- 3. identify a variety of different management styles;**
 - describe an authoritarian, a democratic, and a laissez-faire leader;
 - role-play each of the major management styles;
- 4. apply effective listening skills in classroom and work-related situations;**
 - differentiate between active and passive listening;
 - identify situations where active and passive listening skills should be applied;

5. differentiate between formal and informal communication;

- draw an organizational chart that illustrates the organization of the school and indicate the chain of command;
- identify a variety of forms of communication using examples drawn from stockkeeping and warehousing work environments;

6. list the personal attributes necessary for success in a stockkeeping and warehousing environment;

- describe the importance of honesty, reliability, tact, patience, and enthusiasm in the workplace as well as in their private lives;

7. list ways in which they might increase their personal growth;

- identify personal strengths and weaknesses;
- outline various ways to overcome personal weaknesses and build on personal strengths.

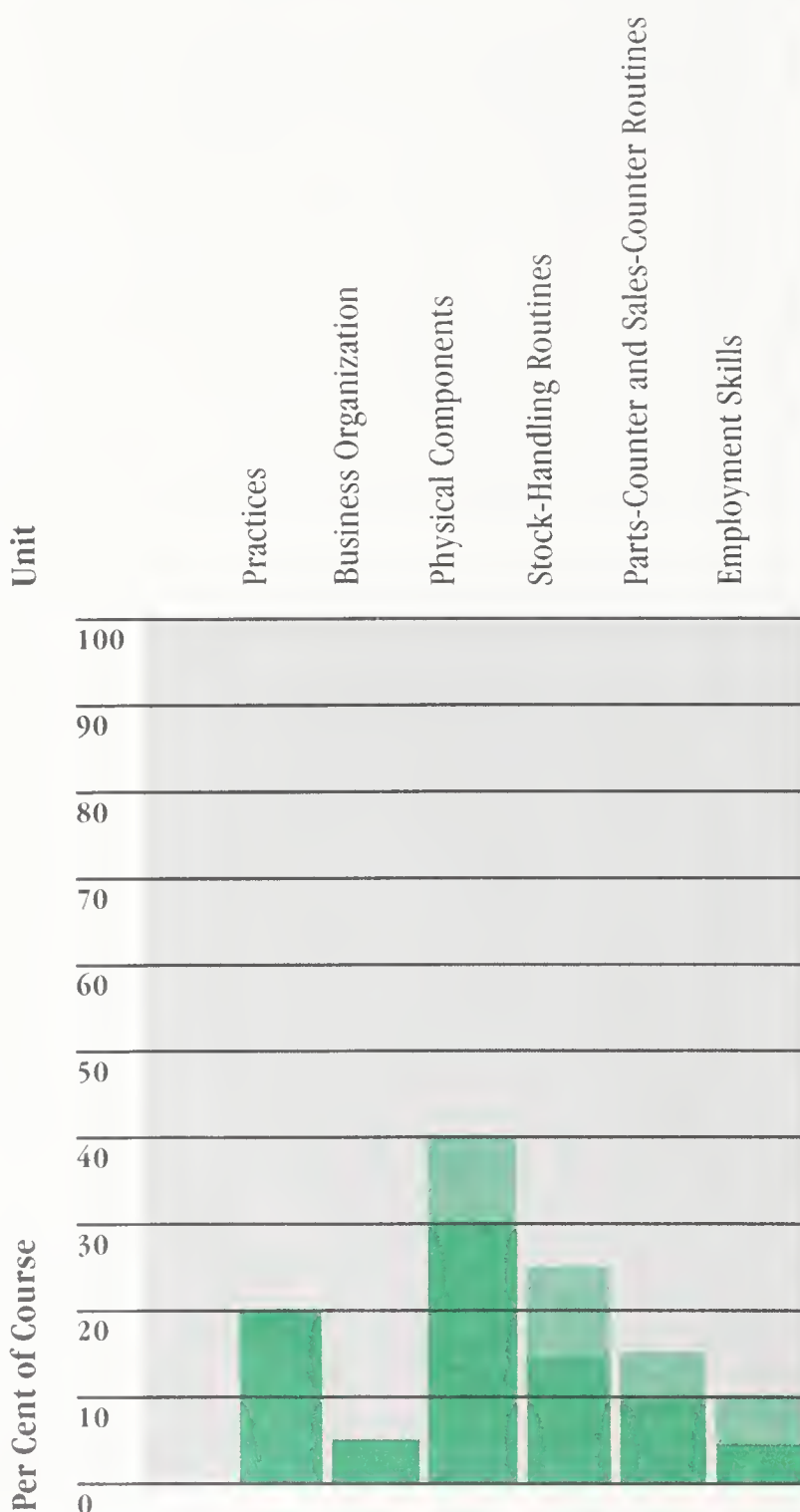
Stockkeeping and Warehousing, Basic Level (BMS3B)

Introduction

This basic-level Senior Division course will introduce students to the aspects of control in a stockkeeping and warehousing environment. Students will further develop their abilities to organize, follow systems and routines, and acquire the skills required for employment in this field. Students may earn a maximum of two in-school credits in this course, for which there are no prerequisites.

Students should be provided with opportunities to:

- identify the physical requirements of an efficient warehouse;
- recognize effective procedures for stock location, inventory control, and security;
- apply effective procedures for purchasing materials, following up orders, and expediting their delivery;
- appreciate the need for product knowledge and practice effective parts- and sales-counter service routines;
- identify job-search skills;
- appreciate the importance of effective communications, interpersonal skills, work habits, and attitudes for success on the job.



Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this stockkeeping and warehousing course at the basic level and are suggested in addition to the general strategies for teaching and for evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

Students should build on their skills in this area and be encouraged to accept new class assignments with a feeling of self-confidence. They should also be encouraged to identify and review the procedures involved for each new task and to proceed carefully, asking for help whenever they feel they need it.

Students should maintain an accurate work log that includes all of the class activities in which they have participated. Teachers should review these logs and use their daily observation records to help students identify areas where their performance could have been improved or where they may need to review particular systems or procedures before repeating the assignment.

The growing use of computers in a warehouse environment requires that teachers expose students to a variety of computerized inventory and stock-record systems developed for computerized warehouses. This can be accomplished through carefully designed field trips, work-experience assignments, or co-operative education programs. It can also be accomplished by using a computer system to record and maintain various supplies that come into the school.

Work experience in the community or in the school receiving area is essential if this program is to have vocational relevance. Work assignments should be carefully chosen by the teacher to provide learning opportunities that are meaningful for students and related to their vocational abilities and aspirations. Teachers should actively supervise these assignments through regular visits, consultations, and reports on student performance.

The overall assessment weighting should reflect both the practical nature of this course and the heavy emphasis on activities and applications as opposed to the learning of theoretical concepts. Students should be involved in both the identification of the criteria for daily performance evaluation and opportunities to assess their own performance and that of others within their work group.

The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Practices	20
II. Business Organization	5
III. Physical Components	30-40
IV. Stock-Handling Routines	15-25
V. Parts-Counter and Sales-Counter Routines	10-15
VI. Employment Skills	5-10

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items outlined in bold face are core content.



I. Practices

Core Content

Students will:

- 1. complete an accurate shipping-record form;**
 - describe the importance of accurate shipping documents;
 - identify the parts of a shipping record (i.e., date of shipment, name and address of consignee, amount, order number, and signature of the carrier's agent);
- 2. complete stock requisitions, packing slips, and invoices;**
 - identify the purpose of stock requisitions, packing slips, and invoices;
 - complete stock requisitions, packing slips, and invoices for the school cafeteria or school store;
- 3. identify the different types of carrier (e.g., bus, truck, train, mail, car, airplane, ship);**
 - list the advantages and the disadvantages of each;
 - use the yellow pages of the telephone directory to identify appropriate carriers in the local business community for specific kinds of materials;
- 4. identify the receiving skills necessary for effectively unpacking, checking, and evaluating the quality of goods received;**
 - explain the meaning of the terms *open check*, *blind check*, and *spot check*;
- 5. complete a damage report;**
 - chart the sequence of events prior to a claim, including the activities of completing a damage report, reporting loss or damage to the purchasing department, retaining the container and contents for inspection, repacking the goods, arranging transportation, and notifying the vendor of shipment;
 - explain why the completed damage reports should be sent to the purchasing department as soon as possible;
- 6. identify the importance of retaining an accurate back-order file to be used when an item is out of stock;**
 - use a manual and a computer-software system to set up a back-order file.

II. Business Organization



Core Content

Students will:

1. **identify different kinds of business ownership (i.e., sole proprietorship, partnership, corporation, co-operative, and franchise);**
 - investigate and describe the advantages and the disadvantages of each;
 - complete a map showing the various kinds of ownership in their local area or prepare a bulletin-board display that illustrates an example of each kind of business ownership located in their business community;
2. **identify the role of stockkeeping and warehousing in representative industries;**
 - diagram storage and control functions as part of a manufacturing or marketing function;
 - identify policies and procedures that apply in particular stockkeeping and warehousing operations.

III. Physical Components



Core Content

Students will:

1. **describe a typical merchandise warehouse;**
 - discuss its various features;
 - tour local merchandise facilities;
 - identify the product lines, quantities, turnovers, and damages that are typically found in a merchandise warehouse;
2. **describe a special-commodity warehouse;**
 - discuss the various features of a special-commodity warehouse;
 - list the kinds of product stored in this type of facility;
3. **identify the factors to consider in planning the layout of a warehouse;**
 - define the term *space utilization* and apply the concept to a warehouse design;
 - identify the requirements for the efficient flow of goods and the maintenance of inventory for varying rates of stock turnover;
 - identify a variety of different docking facilities and explain the application of each;
 - diagram the efficient use of space in a small warehouse;
 - diagram receiving, shipping, packing, and office facilities using graphing paper or a computer-software program;

-
- construct model storage areas and colour-code them to represent varying rates of stock turn-over;
 - use these models to indicate the effective flow of goods within a given area;
4. **identify the reasons for segregating items by size in multistorey buildings;**
 - describe how costs might rise when items are handled too frequently or carried too far;
 - prepare a sample floor plan of a multistorey warehouse and identify areas for specific kinds of inventory;
 5. **identify the most important functions of material handlers;**
 - discuss the importance of minimum handling, fast handling, and the effective use of equipment and space;
 - determine the effect on cost of such procedures;
 - identify the kind of damage that results from excessive handling;
 - identify the need for health and safety procedures;
 6. **describe the application of the term *unit load* in a warehousing environment;**
 - discuss the appropriate use of vertical space to reduce damage, accidents, and handling costs;
 7. **identify the importance of the rate of turnover in the determination of the appropriate location of products;**
 - list the rate of turnover for various products;
 - locate placements for these products on floor plans or storage models;
 8. **identify the advantages and the disadvantages of different types of storage units for specific products;**
 - consider a variety of different types of storage units (e.g., bins, rota bins, racks, modular-shelving bays, line storage);
 - discuss the use of these units in warehousing applications and explain the reasons for using one over the other;
 9. **classify the different costs involved in running a warehouse operation;**
 - consider such costs as rent, heat, hydro, repairs, maintenance, depreciation, losses, insurance, and labour and determine an appropriate yearly budget for the operation of a model warehouse;
 10. **describe what is meant by the terms *cost of goods sold*, *average inventory*, and *stock turn-over*;**
 - discuss how each of these items affects the efficient operation of a warehouse;
 11. **calculate rates of stock turnover and take an accurate physical-inventory count;**
 - use case studies to become more familiar with stock-turnover formulas;
 - allocate a dollar value to items within a specific area of the classroom, list and take a physical count of them, and then determine their total dollar value;
 - use the inventory of the school store or one of the shop areas to calculate the rate of stock turn-over;
 12. **maintain an accurate balance, using a perpetual-inventory system;**
 - compare running bank-account balances with inventory balances;
 - complete perpetual-inventory forms from total sales and shipments received for a day;
 - use an inventory-control computer-software program;
 13. **identify the kinds of products that require special security and safety procedures;**
 - identify items found in their homes that should be kept in safe storage areas;
 - design suitable storage containers and areas for these items;
-

14. list the kinds of materials that require special security procedures in a warehousing environment;

- discuss the need for controlled storage areas and identify appropriate controls for specific goods, such as those that are small, valuable, subject to deterioration or damage, or easily confused with other products;

15. describe the practice of bonding and identify particular applications where it might be important;

- identify particular warehouse environments that would require employees to be bonded;
- discuss the procedures involved in bonding employees and identify factors that would be considered (e.g., a criminal record, the worker's employment history);
- complete an information sheet used by bonding companies and identify the requirements involved.

IV. Stock-Handling Routines



Core Content

Students will:

- 1. demonstrate the use of random, single, and product-line systems;**
 - locate specific products on a diagram, using a list of products and their locations;
 - use consecutive-numbering methods to locate stock;
- 2. outline the correct method for loading shipments into different types of carriers;**
 - discuss the meaning and the application of the terminology used on packing cartons (e.g., this end up, fragile, minimum shifting on loading);
 - identify the importance of following directions and procedures;
 - load containers, following specific instructions;
 - estimate the appropriate size of containers for a variety of items;
- 3. describe the application of FIFO (first in, first out) and LIFO (last in, first out) methods of stock control and give examples of the kind of products that could be stored according to each method;**
 - tour a local warehousing facility or retail outlet to identify the products that would be appropriately stored by these methods.

V. Parts-Counter and Sales-Counter Routines



6. complete an over-the-counter sales invoice;

- handle cash and charge transactions;
- identify the procedures required for efficient cheque and charge payments;
- complete sales invoices accurately and neatly;
- apply over-the-counter techniques in a school store or cafeteria.

Core Content

Students will:

1. describe the role of a purchasing department in the operation of a warehouse;

- make a flow chart showing the handling of goods from the purchase order through to the shipping order;
- apply the terms *COD* (cash on delivery) and *charge* correctly and calculate a variety of discounts and terms of payment;

2. select appropriate kinds of carriers for specific orders;

- discuss the application of lead time to costs;
- use a variety of case studies and stockkeeping situations to practise the selection of appropriate kinds of carriers;

3. use a uniform freight-rate booklet to compare the shipping costs involved in shipping specific goods and products using different kinds of carriers;

4. describe the purpose and the placement of a bill of lading;

- identify the transfer of responsibility for goods as they travel from shipper to consignee;
- complete bills of lading for specific shipments;

5. identify the reasons for customer loyalty;

VI. Employment Skills

Core Content

Students will:

1. identify opportunities for employment in a stockkeeping and warehousing environment;

- list ways to locate job possibilities (e.g., through newspaper advertisements, employment agencies, personal calls on company personnel offices, friends and relatives);

2. prepare sample letters of application and complete application forms for a variety of related employment opportunities;

- complete letters and application forms by following models of them;
- prepare a personal data card for reference purposes when completing application forms;
- identify likely interview questions and prepare responses;
- describe appropriate dress and attitudes for successful employment interviews;
- role-play interview situations to develop effective interview skills;
- use interview rating sheets to highlight positive points and identify areas that need improvement;

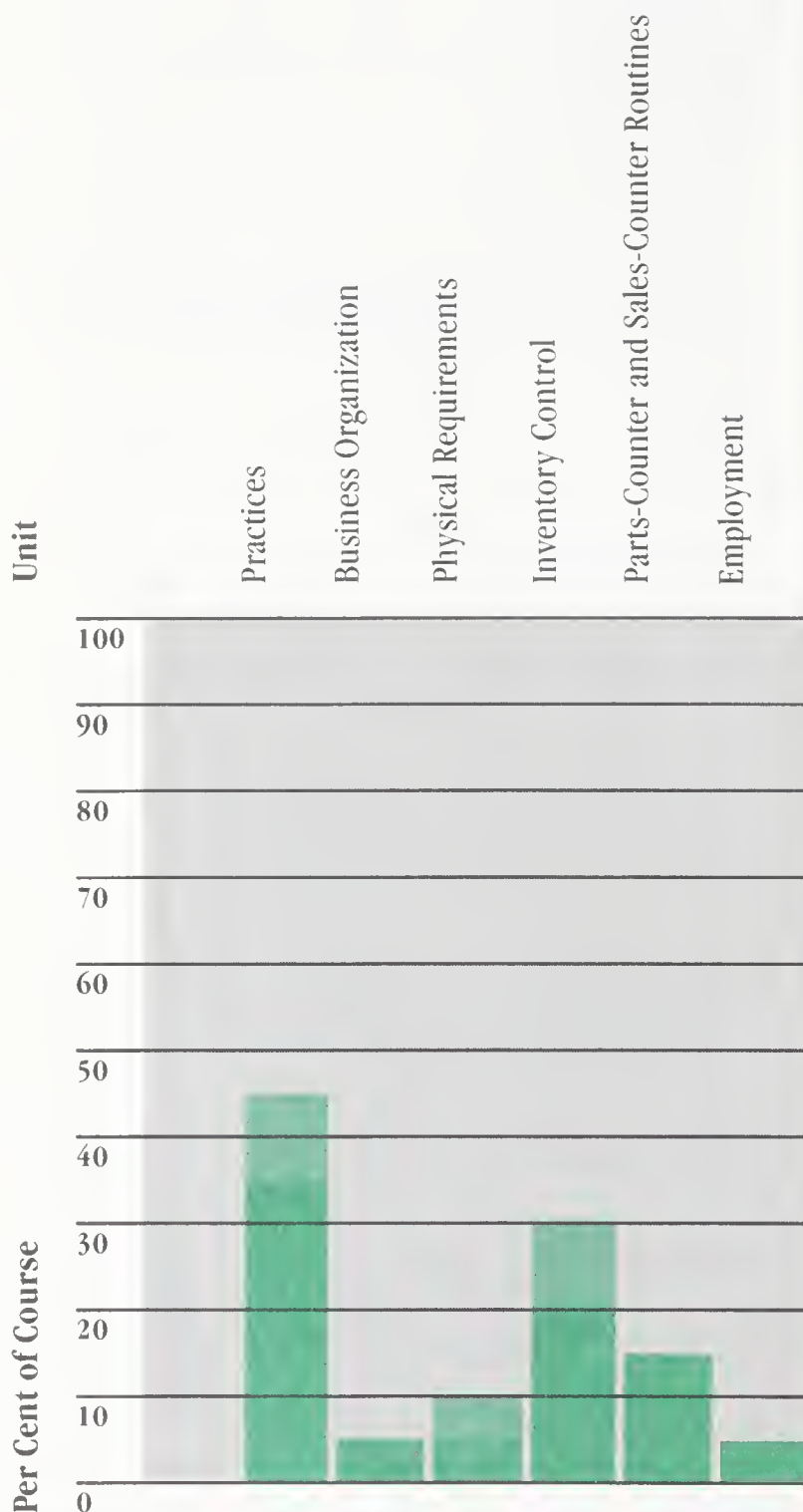
3. identify and explain the different components of a pay cheque;

- identify a variety of salary and wage arrangements (e.g., hourly pay, overtime, minimum wage, vacation pay, salary, commissions);
- describe basic pay deductions (e.g., for taxes, health insurance, unemployment insurance, and pension contributions);
- formulate and use appropriate definitions of *gross pay* and *net pay*;
- identify a variety of fringe benefits that are available in some business establishments and assess their contribution to an employee's wages;

4. examine the collective-bargaining process;

- identify the role and responsibility of unions;
- invite representatives from both business and unions involved in a local stockkeeping and warehousing facility to discuss the process of collective bargaining as well as the roles and responsibilities of both parties involved.

Stockkeeping and Warehousing, Basic Level (BMS4B)



Introduction

In this basic-level Senior Division course, students will further develop their understanding of stockkeeping and warehousing procedures. They will have opportunities to participate in related employment activities to prepare for jobs in this field. Students may earn a maximum of two in-school credits in this course, for which Stockkeeping and Warehousing (BMS3B) is a prerequisite.

Students should be provided with opportunities to:

- apply stockkeeping and warehousing procedures;
- identify appropriate ways to handle materials, use space, move goods, control inventory, and maintain security in a warehousing environment;
- develop a foundation of product knowledge;
- acquire appropriate skills for finding, securing, and maintaining employment in this field;
- apply effective group-work skills;
- identify strategies for effective employer-employee relations.

Teaching and Assessment Strategies

The teaching and assessment strategies included here are specific to this stockkeeping and warehousing course at the basic level and are suggested in addition to the general strategies for teaching and for evaluating student achievement outlined in the introduction to this program and in the business studies policy document *Policy for Program Planning and Delivery*.

Effective work-experience opportunities should be a major component of this course. As they prepare to leave the secondary school environment and move out into the world of work, students need to experience situations that will ease this transition and contribute to their personal sense of optimism and feelings of self-confidence and self-worth.

The daily assessment of students' work and the evaluation of their work habits as they apply to performance expectations on the job are important components in both the overall assessment of student performance and the identification of areas that might need more practice or work. The weighting of evaluation should stress practical applications, with the emphasis placed on students' ability to perform tasks and job assignments efficiently and to demonstrate effective work habits, attitudes, and communication and interpersonal skills related to the job.

The importance of computer applications in this final stockkeeping and warehousing course needs to be recognized through both the kind of applications designed for students and the selection of appropriate field trips, films, videotapes, work experiences, and in-class computer-simulation assignments. Wherever possible, actual job conditions, expectations, and procedures should be depicted or simulated in order to facilitate an easy transition from school to work.

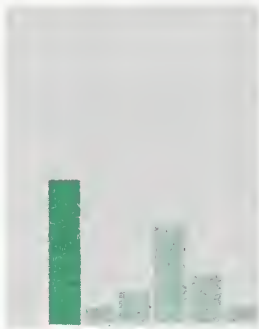
The following table outlines the core units of content for the course and the percentage of class time and relative emphasis for assessment purposes that should be allocated to each unit of content. Note that the sequencing of units is left to the discretion of the teacher. The percentages suggested here allow for the inclusion of optional material of local interest within each unit or as an additional unit.

Suggested Time and Evaluation Framework

Unit	Per Cent of Course
I. Practices	35-45
II. Business Organization	5
III. Physical Requirements	5-10
IV. Inventory Control	20-30
V. Parts-Counter and Sales-Counter Routines	15
VI. Employment	5

Course Content

The main items of course content for each unit are outlined in bold-face type. Each of these is followed by more specific learning opportunities that relate to the main item of content. Note that all of the items outlined in bold face are core content.



I. Practices

Core Content

Students will:

1. **explain why supplying functional products of high quality is conducive to customer loyalty;**
 - list the problems that occur when suppliers send out the wrong product or items of poor quality;
2. **discuss how prompt and efficient customer service promotes good will;**
 - identify the need for accurate communication between the buyer and the shipper;
 - examine the need for constant cross-checking in the preparation of a shipment;
 - list the problems that might occur when a supplier ships an insufficient quantity of products to a buyer or sends a late shipment of products;
 - examine the problems that might occur when a store employee is unfriendly or lacks courtesy and tact when dealing with the public;
3. **identify ways to ensure shipment arrival by required dates;**
 - identify the priorities involved in deciding which shipments to prepare first;
4. **describe the major purposes of different types of material-handling equipment;**
 - list the safety procedures to be followed in working around different types of equipment;
5. **demonstrate an understanding of the tariffs and customs duties encountered when shipments are sent out of the country;**
 - identify the amount of training needed to operate particular kinds of equipment;
 - tour a local warehouse to observe the different types of material-handling equipment in use;
6. **practise recordkeeping procedures for a receiving department;**
7. **record the receipt of merchandise;**
 - review the purposes of a receiving report by studying document flow charts;
 - list the problems that occur if no records are kept on items received, back-ordered, or damaged;
8. **demonstrate the checking methods required for evaluating the condition and quality of items shipped;**
 - investigate the importance and application of quality control;
 - discuss the need for care in handling goods unloaded or placed in storage;
9. **explain the meaning of *demeurage* and *free time* and discuss how *demeurage* charges can be minimized by scheduling the arrival of carriers;**
 - list the variety of free times or unloading times given by different types of carriers;
 - working from a list of carrier arrivals and their free times, plan arrival times to minimize *demeurage* charges;
10. **identify items that were out of stock when orders were being prepared and maintain accurate records of them;**
 - identify problems that would occur if accurate records were not maintained;
 - solve sample problems requiring the shipment of out-of-stock items;

11. practise appropriate procedures for unpacking merchandise;

- explain the purpose of a packing slip and a purchase order;
- given a purchase order and a shipment of goods, identify the items missing from the shipment and show these as back-ordered stock on a packing slip;
- examine a completed packing slip that indicates back-ordered items;
- complete a blank packing slip, showing how to back-order items;

12. identify the criteria for effective packaging;

- discuss protection, advertising, and convenience;
- evaluate various packages on the basis of these criteria;
- design packages for a variety of products;
- identify the differences among the major types of packaging (e.g., cartons, boxes, containers);

13. explain the purpose of an invoice and a packing slip and show the routing on a flow chart;

14. complete an invoice, including price extensions;

- solve problems using blank invoices;
- work with invoices, using models from the school cafeteria or school store;

15. recognize the use and identify the routing of claim forms and complete claim forms for damaged, incorrect, or incomplete shipments;

- list the purposes of claim forms when a shipment is incomplete or damaged;
- show the routing of claim forms on a document flow chart;
- examine completed claim forms;
- discuss the major headings and the information to be inserted under each heading on a claim form;
- solve various problems, using blank claim forms.

II. Business Organization



Core Content

Students will:

1. develop an organizational chart to show the position of stockkeeping and warehousing in an organization and describe the line and staff authority involved;

- discuss the purpose of an organizational chart;
- develop an organizational chart for a small company, showing the position of stockkeeping and warehousing;
- define the terms *line* and *staff*;
- draw a chart showing typical line and staff authority;

2. describe several major departments in an organization and identify the lines of communication;

- list the duties of each department;
- develop a chart showing how each department is organized.

III. Physical Requirements

Core Content

Students will:

1. identify special problems associated with cold-storage warehousing;

- prepare a list of the more common items stored in a cold-storage warehouse;
- compare a general-merchandise warehouse with a cold-storage warehouse (e.g., in terms of energy costs, extra equipment required, and extra insurance costs for perishable inventories);
- tour a local cold-storage facility;

2. describe the purpose of bonded warehouses and provide examples of the products stored in these facilities;

- list products or items in the home that might be considered suitable for storage in a bonded warehouse;
- discuss additional costs that might be incurred in operating a bonded warehouse;

3. identify the purposes of private warehouses;

- make a list of local companies or institutions that would operate their own warehouses;
- prepare a diagram to show how private warehousing operation relates to the distribution of manufactured goods;

4. discuss the efficient use of time in completing warehousing tasks;

- utilizing the concept of containerization, investigate how time savings may be computed when all items are organized into one or two containers and moved in bulk;
- tour a local wholesale facility to study the use of time and space;

5. identify the importance of the efficient organization of space in the designing of a warehouse layout;

- discuss the dollar value of space and the time savings that can be realized when fast-moving items are located close to shipping and receiving doors;
- identify how the use of vertical space can maximize profits;
- use a three-dimensional model to show the efficient use of horizontal and vertical space;
- demonstrate the efficient use of space in an in-school model;

6. discuss the importance of different locating systems;

- explain the meaning of *random*, *manual*, *single*, and *product line* with respect to different locating systems;
- allocate sequential numbers to aisles and bins in a basic warehouse layout;

7. examine computer applications for the locating of stock;

- visit local wholesalers to examine stock-locating systems in operation.



IV. Inventory Control

Core Content

Students will:

1. identify the procedures for the safe operation of material-handling equipment;

- compare types of material-handling equipment in terms of their purpose and efficiency in moving specific types of goods;
- develop procedures for the safe handling of materials;
- assess the dangers inherent in the careless operation of moving equipment and identify safe operating procedures;
- use Industrial Accident Prevention Association films and posters that reinforce the need for safety;
- visit a warehouse to observe the procedures used to ensure the safe operation of material-handling equipment;

2. discuss the FIFO method of stock rotation and identify the concepts of working-stock and overstock storage;

3. identify the different methods used to forecast and reorder stock;

- discuss reorder points and what to reorder;
- develop a list of problems that may occur if an item is allowed to fall to zero in the balance;
- develop an understanding of trends in forecasting by completing an in-school simulation;

4. establish minimum and maximum stock quantities for specific products stocked in the school store or school storeroom;

- discuss the importance of setting realistic minimum and maximum quantities using a perpetual-inventory card;
- set the quantities for the in-school model;
- use a computer program for inventory control to keep records of the products in the school store or the school storeroom;

5. investigate the need for security;

- comment on the role of insurance and the protection it offers;
- invite personnel from a security agency to speak to the class about the duties and qualifications necessary for employment in this field;

6. describe the electronic security system used in warehousing;

- investigate the use of revolving cameras such as the ones used in banks and retail stores;
- examine the use of burglar-alarm systems, particularly those connected to police stations;
- invite a warehouse manager to the school to discuss security in a warehouse;

7. explain the procedures used in a controlled-access system;

- list the types of products stored in a controlled-access area;
- describe the methods of access to such an area, including the computerized fingerprint method and the use of special pass cards that are verified by an electronic eye;

8. describe how fidelity bonding acts as a security system.



V. Parts-Counter and Sales-Counter Routines



Core Content

Students will:

1. **describe how “free on board” affects shipping costs;**
 - discuss shipping costs in terms of the cost of loading, the cost of shipping, and the cost of unloading;
2. **identify how “on board” affects title to the goods in transit;**
 - describe true ownership and the responsibility for the transfer of goods;
 - list various air, water, and rail shipping terms and explain the meaning of each;
 - complete a blank receipt for damaged goods;
3. **describe the proper procedures for processing a purchase order;**
 - complete several blank purchase orders in neat, legible writing;
 - complete price extensions on a purchase order, using hand or electronic calculators;
 - show the processing sequence of purchase orders on a flow chart;
4. **compare the costs of several carriers;**
 - list products, indicating their weight, value, and size; take into account their starting points and destinations; and compare the cost of shipping them by various carriers;
5. **maintain a back-order file;**
 - determine why items should be back-ordered;
 - explain why purchasing requires the documentation of items requiring payment and items not received;
 - list the reasons why follow-up procedures may be necessary;
 - develop a back-order file and a damaged-goods file, using an in-school model;
6. **investigate the use of microfiche in a stockkeeping environment;**
 - identify the reasons for using a microfiche system;
 - complete a diagram of a microfiche machine, labelling all the parts;
 - visit a public library or a school library and use the microfiche system to locate specific books;
7. **demonstrate the skills necessary for handling special orders effectively;**
 - write up an order and place the order with a local supplier;
 - confirm the lead time and practise contacting the customer on the arrival of the goods;
8. **investigate the need for up-to-date customer records;**
 - examine sample records and determine the information to be kept on these records;
 - list the good-will benefits of maintaining standard information on regular customers at a parts counter;
9. **identify the need for the quick and accurate operation of a point-of-sale terminal;**
 - identify the control function of a point-of-sale terminal;
 - identify the purpose of a cash float;
 - make change accurately and quickly.

VI. Employment



Core Content

Students will:

1. develop a personal inventory of skills and prepare a data sheet;

- discuss the use of a personal inventory;
- examine various sample résumés;
- discuss the need for a résumé;
- complete a personal résumé;

2. describe the appropriate dress, deportment, and procedures to adopt when applying for a job;

- role-play job interviews with teachers and other school staff members;
- complete checklist rating sheets for simulated interviews and use the information to improve their interview performance;

3. identify the rights and responsibilities of employees and employers;

- discuss the Human Rights Code as it applies to discrimination and working conditions;
- examine various government regulations regarding minimum wages, overtime pay, and holiday pay;
- understand the role and purpose of the Workers' Compensation Board;

4. examine the collective-bargaining process and the role of the union in business.

1. The first part of the document is a list of the names of the persons who were present at the meeting. The names are listed in alphabetical order.

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